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ABSTRACT

A national survey sought to identify the competencies that chief school business administrators (CSBAs) in large and small school districts think are important for their job. Seventy-five respondents, out of a random stratified sample comprising 143 members of the Association of School Business Officials, ranked 264 statements in 28 major task areas on the Competency Statement Instrument (CSI). Each competency statement was ranked on a scale measuring the CSBA's degree of responsibility for the task and a scale measuring the level of importance of CSBA competence in the task. Among the 28 task areas were financial planning and budgeting, fiscal auditing and reporting, purchasing, legal control, office management, plant maintenance, community relations, data processing, transportation services, food service, and staff development. Statistical analysis indicated that the CSBAs considered fiscally-related competencies most important; that CSBAs have less responsibility for more specialized areas, such as facilities planning; that CSBAs from small districts ranked some fiscal competencies higher than did large districts' CSBAs; and that CSBAs from large districts delegated more responsibilities than did those from small districts. Tables showing the survey results are appended, as is a copy of the CSI. (RW)

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COMPETENCIES NEEDED BY CHIEF SCHOOL BUSINESS ADMINISTRATORS

A REPORT ON THE RESULTS, CONCLUSIONS AND
IMPLICATIONS OF A RESEARCH STUDY TO IDENTIFY
THE COMPETENCIES NEEDED BY CHIEF SCHOOL
BUSINESS ADMINISTRATORS IN LARGE AND SMALL
SCHOOL DISTRICTS.

EA 014 753

By C.W. McGuffey, D. Ed.

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PREFACE

The basic, underlying professional objective of the Research Corporation of the Association of School Business Officials (RC-ASBO) is to identify and share timely, appropriate information about school business management. This publication about competencies needed by Chief School Business Administrators in large and small school districts is another example of how RC-ASBO programs meet that objective.

This is a unique publication, based on the results of nearly five years of research and study by Dr. Carroll McGuffey, Professor of Educational Administration, Bureau of Educational Studies and Field Services, University of Georgia, and the University Contacts Research Committee of the Association of School Business Officials (ASBO). The need for identifying the competencies required of Chief School Business Administrators was identified by the Committee in 1975 in response to the accountability movement. It was agreed that a research study to identify these competencies could have a significant impact on clarifying what business officials should be required to study; guiding those planning continuing or in-service education programs; identifying factors that could be used in a performance-assessment program; determining the importance of tasks school business administrators are expected to perform; providing direction in the preparation of job descriptions and role definitions; and providing information needed to form the basis for a competency-based certification program.

The resulting study, upon which this publication is based, was conducted by Dr. McGuffey, the current Chairman of the Committee. Dr. McGuffey has reported to the ASBO membership on the results of the study for the past three years at discussion groups of the Association's Annual Meeting. His first report, in Washington, D.C. in 1978, reported preliminary results. In Denver, Colorado, in 1979, Dr. McGuffey presented more detailed results of his study. In New Orleans, in 1980, he reported on his final results...the information on which this publication is based.

I have a strong personal interest in this publication. As a practicing Chief School Business Administrator at High School District 211 in Palatine, Illinois, I participated in the study as a respondent to Dr. McGuffey's questionnaire. While in that position, I served as Vice Chairman of ASBO's Professional Development Research Committee because I had a strong interest in the continuing professional development of school business officials.

I am particularly pleased with the results of the study and the competencies

it identified because this information will help ASBO as it enhances its existing programs and implements new programs to meet the certification and continuing education needs of practicing school business officials.

Dr. James L. Slater, RSBA
Executive Director
RC-ASBO

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INTRODUCTION

The trend toward competency-based education in the United States is widely recognized. The growing pressures for competency-based education programs and performance-based certification are expected to continue at least for the near future. More recent pressures appear to focus on the establishment of competency-based teacher education programs and competency-based preparation programs for principals and other school administrators.

Identifying the competencies needed by a Chief School Business Administrator (CSBA) developed as a primary concern of the University Contacts Research Committee of the Association of School Business Officials (ASBO) in 1975. There appeared to be a need for a meaningful response to the so-called "accountability movement" and a desire to have some say about this matter in the area of school business management. A decision was made by the Committee to conduct a study of the competencies needed by the Chief School Business Administrator to perform his responsibilities at the district level. It was believed that such a study could make a substantial contribution to the formulation of both preparation and continuing education programs for school business administrators. Some of the potential results of the study were identified as follows:

- 1) Identifying competencies could help clarify what school business administrators should be required to study.
- 2) Identifying competencies could provide guidance to those planning continuing or in-service education programs.
- 3) An accurate list of competencies could provide the behaviors to be used in a performance-assessment program. The competencies could help determine the importance of tasks that school business managers are expected to perform.
- 4) An accurate list of competencies could provide school districts with guidance in the preparation of job descriptions and role definitions for its business administrators.
- 5) An appropriate list of competencies could provide essential information needed to form the basis for a competency-based certification program.

A review of the available literature revealed that there was no set of competencies that school business administrators universally could accept as being either desirable or necessary to the performance of their duties and

responsibilities at the district level. Some of the findings from the literature search provided insight into the efforts that have been made to study leadership and leader behavior and to determine the type of preparation programs needed for school business administrators. Only a few research studies have been conducted in an attempt to identify competencies of school business administrators in but a few states.

The review of the literature revealed that although there have been hundreds of studies of leadership and leader behavior during the last several decades, there is no universally accepted theory of leadership, no agreement on a definition of leadership, and no one set of practices that will always yield the best results. The review failed to show any research studies in the published literature on the leadership or leader behavior of the school business administrator. Apparently, far less is known about the various facets of leadership than might be expected.

The literature review did identify a few studies of the competencies of school business officials that are worth noting. Hazuda (1965) studied the perceived competencies of school business officials in New York State and the importance of competencies to effective performance. Fifty-nine competencies were developed from his analysis.

The 59 competencies developed by Hazuda were used by Dickie (1970) to analyze the perceived role of the school business official in 60 New York school districts. The Chief School Business Official and three additional administrators from each district were queried. The results of the study indicated that in those districts employing education-certified school business officials, administrators believed conceptual skills were more important than technical skills. In those districts employing school business officials certified by the Civil Service Commission, technical skills were believed to be more important.

Graff and Street (1956) said this about the work of the National Cooperative Program in Educational Administration:

"Their (NCPEA) concern is based upon the idea that the desired competence must be adequately defined and described before preparation programs can be designed to contribute in its development." (p. XVII)

The purposes of this study, then, were: 1) to determine what competencies are important to the practicing Chief School Business Administrator; 2) to establish what differences, if any, exist among various sizes of school districts; 3) to learn what competencies are involved in shared and delegated responsibilities; and 4) to analyze whether competencies performed by school business administrators vary by size of school district.

Three major assumptions formed the basis for this study:

- 1) There is an identifiable set of competencies needed by the Chief School Business Administrator to perform his responsibilities;
- 2) Chief School Business Administrators are best able to identify their needed competencies; and

3) Consensus of the Chief School Business Administrators on needed competencies would produce a complete and comprehensive list.

There were, however, several limitations to the study. These included:

- 1) The population for the study was limited to members of the Association of School Business Officials in the United States; thus, not all business officials were given an equal chance of being selected in the sample. Further, individual consent to participate probably produced some bias in sampling.
- 2) Only Chief School Business Administrators were asked to participate, thereby excluding lower level specialties in the school business field.
- 3) Consideration of the needs of private schools, junior colleges and universities were excluded.
- 4) Perceptions of subordinates and superordinates as to needed competencies were not identified.

A total of eight questions were raised and examined in this study. The principal research question examined was: Is there concurrence of perceptions among Chief School Business Administrators from school districts of different sizes as well as the group as a whole as to what competencies are important in the performance of their responsibilities?

Other questions derived from the principal research question examined in the study were as follows:

- 1) To what extent do CSBAs agree on selected competency statements?
- 2) How do Chief School Business Administrators rank the selected competency statements?
- 3) To what extent do CSBAs assume responsibility for the performance of activities related to a particular competency?
- 4) When responses of CSBAs are aggregated by task cluster, are there significant differences in the importance of the competency statements that may be due to size of school district?
- 5) If responses of CSBAs are aggregated by task cluster, are there significant differences in the responsibility scores that relate to a particular competency statement that may be due to the size of school district?
- 6) If importance scores are aggregated by task cluster, are there differences in the mean importance scores assigned to selected task clusters by CSBAs in school districts with or without capital budgets?
- 7) Are there differences in the importance response scores of CSBAs by responsibility category for major task clusters in districts with or without capital budgets?

CHAPTER I

THE COMPETENCY CONCEPT

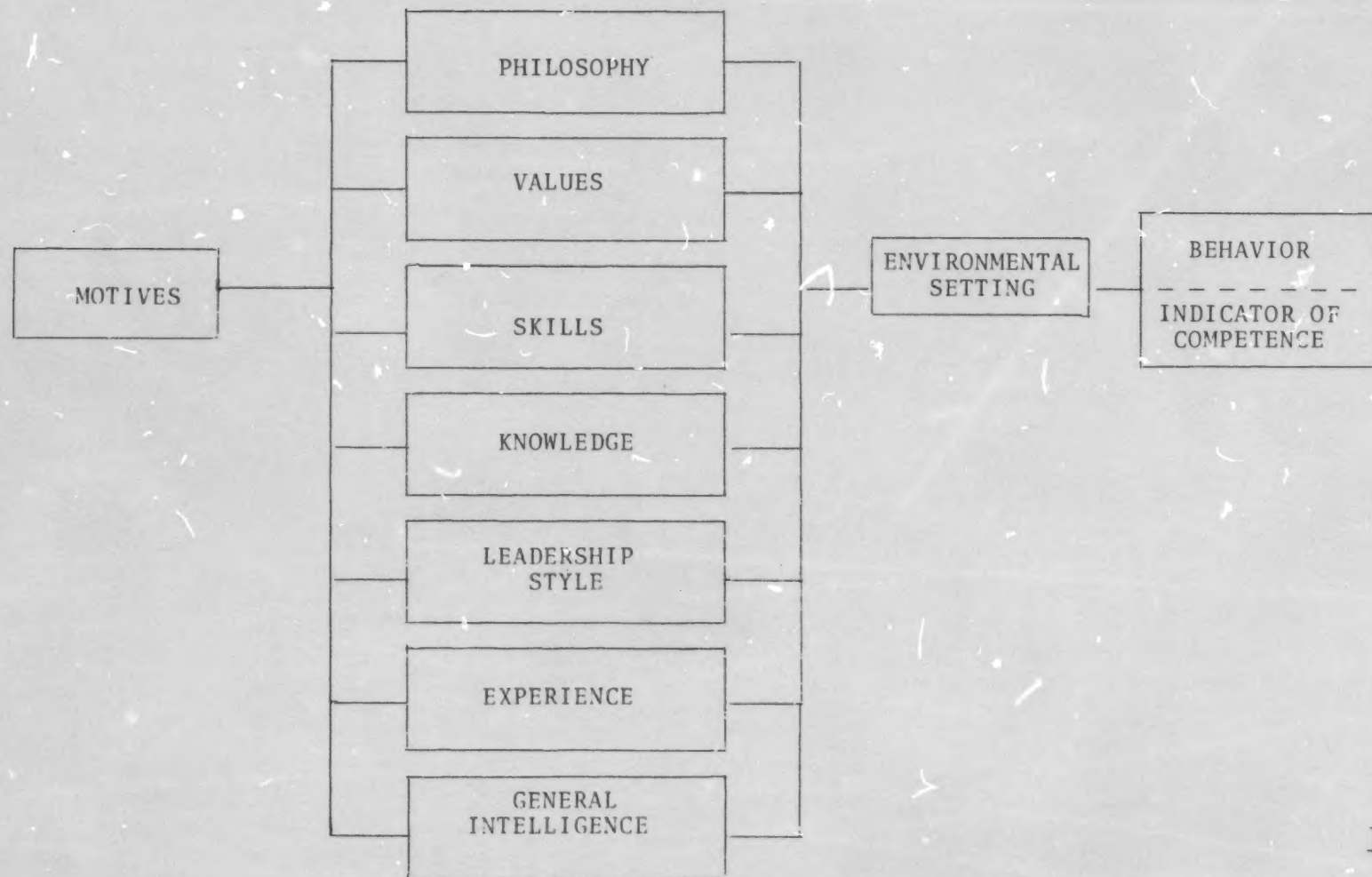
According to Webster, to be competent means to be sufficient or fit for the purpose. Competency, Webster says, is capacity equal to the requirement, adequate fitness or ability.

The Southern States Cooperative Program in Educational Administration (SSCPEA) defined competency in Educational Administration (1955). According to SSCPEA, competency in Educational Administration results when an individual exhibits behavior that enables him to perform a particular administrative task in the most desirable manner. In many cases, the designation of the task and the selection of a strategy of performing it depends upon the value base possessed by the individual. The value base which guides an individual's behavior is a "theory of educational administration," and the task performed is the job of educational administration. The various skills, abilities and knowledge that an administrator draws upon to perform the task represents his personal equipment. The relationship of the three elements - theory, job and "know how" - has been called the "competency concept" (SSCPEA, 1955, p. 46).

For purposes of this study, a competency was defined as a characteristic or set of characteristics of the behavior exhibited by a person in the acceptable performance of a task. The behavioral characteristic is manifested by the extent to which performance satisfied the requirements of the task, and the conditions of the physical setting in which the task is performed. The behavior, in this instance, is what the performer does and how he does it when he performs the task - not what he thinks, what he believes, what he knows or what his attitudes or values are. A number of variables are in interaction when the behavior is demonstrated by a performer. The task, the strategy used to perform the task and the individual's behavior are all in interaction when the behavior is demonstrated.

The underlying assumption of this definition is that a person involved in the performance of a task in school business administration draws upon a lot of personal qualities that causes him to behave as he does. His philosophy, values, talents, skills, knowledge, experience, intelligence, and leadership style are all involved. These personal qualities are applied in the variety of environmental settings in which one operates. The result is a set of behaviors that reflects the competence to perform an assigned task. Figure I represents an attempt to model this process. The "motives" referred to in the graphic representation suggest that the personal and organizational goals merge to give direction to the use of the individual's personal qualities in a given environmental setting to illicit or generate a behavior in the performance of a task.

Figure 1
Antecedents to Behavioral
Indicators of Professional Competence



The task is performed in a work environment that varies with its structural qualities; i.e., a riot vs. a symphony, an air conditioned school vs. a steel mill. The task has a set of basic requirements that are predetermined by output expectations which may involve the nature of the results expected, limited resources, effectiveness and so on. Everyone has personal qualities such as knowledge, skills, experience and personal traits that make each individual distinct. Every person brings those personal qualities into play when he performs a task in a particular work environment. The output of the interaction of an individual's personal qualities on a specific task in a particular work setting is competent or incompetent behavior. Competence or incompetence is demonstrated by the performer's behavior in the performance of the task. Therefore, the characteristics (or quality) of the performer's behavior is an indicator of competence. The behavior is not the competence, but the quality of the behavior indicates competence or incompetence; thus, one can judge competence from a performer's behavior (from what a performer does).

There are, perhaps, numerous qualities or characteristics that may be identified as indicators of competence. However, for purposes of this study, a competency statement that describes what a performer does and how he does it when he performs a task will serve as the indicator of competency needed by the school business administrator to perform his responsibilities.

For this study, a competency statement was assumed to have a specific structure which could be identified and described. If a competency statement is to describe what a performer does and how he does it when he performs a task, then, the competency statement must have structural characteristics that set it apart from other statements that may describe behaviors that do not indicate competence.

It was reasoned that functions and tasks vary both by vertical level and by horizontal division within an organization. The school business administrator by virtue of the nature of his work has a different set of tasks to perform than his instructional counterpart. Because of the vertical structure found in most school organizations, the school business administrator performs a different set of functions from individuals within his division. For example, compare the role of an electrician in the maintenance department or the role of a fiscal clerk in the accounting department with the role of the Chief School Business Administrator and the results should become more obvious. Perhaps the obvious should not be belabored; nonetheless, it appeared that a competency statement usually would include a behavior variable, a role/function variable and a work/task variable. The behavior variable would be a descriptive word perhaps expressing the role or function of the performer. The role/function variable would be expressed in the competency statement in some form, perhaps in combination with the behavioral variable. Similarly, work/task clusters would also be included to indicate the work being performed.

CHAPTER 2

THE COMPETENCY STUDY

The original intent was to conduct a Delphi Study utilizing three rounds. However, the numbers responding to the first round of a questionnaire clearly indicated that the returns probably would not be adequate to justify the three round process. Therefore, a survey technique was utilized. The general procedures were as follows:

- 1) An extensive survey of the literature dealing with leadership, functions, tasks and formal preparation of the school business administrator was made.
- 2) A survey instrument was developed and piloted.
- 3) A random population sample of Chief School Business Administrators was selected from the membership of ASBO. A letter was mailed to each person in the sample to secure his participation in the study.
- 4) The survey instrument was mailed to those CSBAs who had agreed to participate in the study.
- 5) The questionnaires were received and the data were tabulated and stored on computer tape.
- 6) The data were analyzed and treated statistically.

The population was a computer list of approximately 2,600 ASBO members who had Chief School Business Administrator titles. The list was then reduced to approximately 2,200 names by eliminating persons in private schools, vocational schools, community colleges and other agencies not clearly in chief school business official positions in local school districts. A letter requesting their consent to participate and a questionnaire requesting demographic data were mailed to the 2,156 persons on the residual list. Approximately 1,000 persons replied to the questionnaire. From this group, a computer program was used to select a 15% stratified random sample of participants. The Competency Statement Instrument (CSI) for the study was mailed to the 143 persons in the sample. The stratification of the sample was made on the basis of the size of the districts' annual operating budgets. Table I indicates the annual budget codes in millions of dollars and the number of persons in the four different strata established for the sample.

Table I
Annual Budget Categories Used
as Size Classifications

Class Code	Annual Budget Code (Millions)	N Actual Sample
1	Less than 4.9	24
2	4.9 to 9.5	22
3	9.6 to 19.5	14
4	Above 19.5	14

Even though respondents had indicated full cooperation, only 75 usable instruments were returned. This was 53% of the number mailed to the respondents.

Data Collection

The data collected were the responses of the CSBAs to the Competency Statement Instrument (CSI) which was composed of three parts: 1) The competence statements; 2) A level of importance scale; and 3) A responsibility scale.

Competency statements

Two hundred and sixty-four competency statements were developed from the 28 major task areas, seven function variables and behavior variables described in Chapter IV. A sample of the instrument is included as Appendix A.

Level of importance scale

The importance scale consists of four major response categories:

- No importance - 0
- Little importance - 1 2 3
- Average importance - 4 5 6
- High importance - 7 8 9

The purpose of this scale was to determine the relative importance of each of the competency statements included in the competency statement instrument.

Responsibility scale

The responsibility scale includes four components:

- 0 - No responsibility
- 1 - Shares responsibility
- 2 - Delegates responsibility
- 3 - Performs the responsibility.

The purpose of this scale was to determine to what extent a Chief School Business Administrator assumes responsibility for the performance of the behavior described by the competency statement.

Statistical Analysis

A computer data file was prepared to include the 75 respondents' responses to the level of importance and responsibility scales of the competency instrument so that tabulations, cross tabulations and statistical treatment could be applied. The statistical procedures used can be summarized as follows:

- 1) Importance score frequencies were tabulated by competency statement.
- 2) Means and standard deviations of importance scores were computed for each competency statement.
- 3) Importance score means were compiled for each task cluster.
- 4) Task clusters were ranked according to importance scores compiled from responses to competency statements.
- 5) Importance scores were compiled by responsibility category for each competency statement.
- 6) Analysis of variance was computed to determine if significant differences in importance scores existed among size categories.
- 7) Analysis of variance was computed to determine if significant differences existed in importance scores assigned to competency statements by respondents in districts with no capital fund budgets and those with capital fund budgets.
- 8) Pearson correlation coefficients were computed for mean importance scores by responsibility category for respondents from districts with capital budgets.
- 9) Response frequencies of responsibility measures were tabulated by competency statement.
- 10) Response frequencies of responsibility measures were aggregated by task cluster.

CHAPTER 3

IMPLICATIONS OF THE STUDY

Analysis of the data gathered and the results of the study identified five implications.

First, Chief School Business Administrators place high importance on fiscal tasks and less on other tasks that traditionally have been accepted as being their responsibility. These findings should be examined in light of other apparent phenomenon, such as the development of specialists in facilities, personnel, public relations and data processing. The implications are that the role changes suggested by the findings of this study should be verified in a study designed for that purpose; particularly, since specialists are assuming roles at comparable position levels to CSBAs in a school district's organizational structure.

Second, this study pointed to possible differences in the way CSBAs in small school districts perceive their roles as compared to the perceptions of the CSBAs in large school districts. Additional study is needed to further delineate the possible differences.

Third, implications for certification of CSBAs are indicated. As the movement towards competency based certification of teachers and principals gains momentum, it is likely that legislators and others concerned about educational accountability will choose to require competency based certification for school business officials as New York did in 1975.

Fourth, the complexities of school business administrators are clearly indicated from the study. The preparation of a job description for a Chief School Business Administrator clearly constitutes a major problem in view of the potential of 260-plus competency statements developed in this study. The implication for job/role definition is complicated. Careful role delineation is vital since the potential for the school business program is extensive and involves a myriad of school business and school business-related tasks. Careful decisions must be made in the determination of the tasks to be assigned to the position.

Fifth, implications for preparation programs are reasonably clear. The Chief School Business Administrator must be trained as a generalist in the school business field. He will perform management functions; and, whether in a large or small school district, he will need thorough preparation in the fiscally-related task clusters. He will need to know how to delegate, motivate, monitor and control specialists in some of the more specialized business fields. For those tasks which he delegates and shares, the CSBA will need orientation, survey and familiarization courses to deal with needed competencies.

The main thrust of the preparation program should be in the general management area and in those task clusters rated as highly important and for which the largest number of CSBAs perform. The emphasis should be on a competency based preparation program.

CHAPTER 4
PROPOSED COMPETENCIES OF THE CHIEF
SCHOOL BUSINESS ADMINISTRATOR

Competencies are demonstrated in the performance of tasks. Tasks delineate the job of school business administration. In order to determine the full set of competency statements needed by school business administrators, it was necessary to identify the clusters of tasks of school business administration. Clusters of tasks are tasks classified according to specialization. Those included were considered essential to the accomplishment of the work of the organization.

The procedures followed in identifying the task clusters of school business administration were as follows:

- 1) A review of the literature was made to discover major task areas or similar tasks that could be grouped together.
- 2) Major groups of tasks were recorded by author or reference source in tabular form.
- 3) If a major task group (area) was mentioned by more than one author or source; then, that task group was used as a work/task variable for preparing competency statements.

A total of 28 work/task areas were identified after examining the work of more than 20 authors -- a general area and 27 specific areas. The specific work/task areas were:

- | | |
|---|--|
| ..Capital Fund Management | . Legal Control |
| . Cash Management | . Office Management |
| . Classified Personnel Management | . Payroll Management |
| . Community Relations | . Plant Maintenance |
| . Construction Management | . Plant Operations |
| . Data Processing | . Plant Security and Property Protection |
| . Educational Facilities Planning | . Professional Negotiations |
| . Educational Resource Management | . Property Management |
| . Financial Planning and Budgeting | . Purchasing |
| . Fiscal Accounting and Financial Reporting | . Staff Development |
| . Fiscal Audits and Reports | . Student Activity Funds |
| . Food Service | . Transportation Services |
| . Grantsmanship | . Warehousing and Supplies Management |
| . Insurance and Risk Management | |

Table II lists the 27 specific work/task in alphabetical order and identifies the authors and researchers who reported on each major task area.

TASK CLUSTERS IN SCHOOL
BUSINESS ADMINISTRATION

Major Task Areas
Table II

Author or Researcher	Capital Fund Management	Cash Management	Classified Personnel Management	Community Relations	Construction Management	Data Processing	Educational Facilities Planning	Educational Resour- ces Management	Financial Planning and Budgeting	Financial Accounting and Financial Reporting	Fiscal Audits And Reports
Rosenstengel & Sweirs (1947) (MLinn, 1956)	X		X		X				X	X	
Linn (1956)	X		X				X		X	X	X
Knezevich & Fowlkes (1960)	X	X							X	X	X
Roe (1961)			X		X		X	X	X	X	
Hill & Colney (1964)	X		X	X	X		X	X	X	X	X
Hazuda (1966)		X	X	X	X	X	X	X	X	X	X
Jarvis, Gentry & Stephens (1967)	X					X	X			X	X
Jordan (1969)	X		X	X	X	X	X	X	X	X	X
Hill (1970)	X		X	X	X	X	X	X	X	X	X
Nelson & Purdy (1971)			X	X	X		X		X	X	X
AASA (1966)*			X		X	X	X		X	X	
RCASBO (1971)								X			
Candoli et al (1972)	X		X	X			X	X	X	X	X
Knezevich (1973)								X			
Kaiser & Webb (1974)			X	X	X	X	X	X	X	X	
NYASBO (1975)			X	X	X	X	X	X	X	X	

TASK CLUSTERS IN SCHOOL
BUSINESS ADMINISTRATION

Major Task Areas
Table II

Food Service	Grantsmanship	Insurance and Risk Management	Legal Control	Office Management	Payroll Management	Plant Maintenance	Plant Operations	Plant Security and Protection	Professional Negotiations	Property Management	Purchasing	Staff Development	Student Activity Funds	Transportation Services	Warehousing and Supplies Management
X		X			X	X	X			X	X				X
X		X	X	X	X	X	X				X			X	X
X		X			X	X	X			X			X	X	X
X		X	X	X		X	X				X			X	X
X		X		X	X	X	X	X	X		X	X	X	X	X
X			X	X		X	X	X			X	X		X	X
X					X	X	X				X			X	X
X	X	X	X	X		X	X	X	X	X	X	X		X	X
X	X	X	X	X		X	X	X	X	X	X	X		X	X
X		X			X	X	X				X		X	X	X
X		X			X	X	X				X			X	X
X		X	X			X	X				X	X		X	X
X	X			X		X	X				X	X		X	X
X	X			X		X	X				X	X		X	X

The Functions of School Business Administration

To derive a competency statement, it was also necessary to identify functions performed by a Chief School Business Administrator. The role/function variables are groups of management processes that describe the role performed by the school business administrator. Functions serve to delineate the role of the performer. The performer derives strategies from the functions for which he is responsible. Functions, together with major task areas, serve as the decision-making parameters for the behavior that is involved in the competency.

A review of the literature revealed a number of different lists of management functions. Fayol (1916) has been credited with describing the original list of management functions. Hill (1970) revised and expanded this original list for school business management.

The list used in this study was identified and described by Haiman and Scott (1973). The list of functions used in the preparation of competency statements were planning, organizing, staffing, influencing, controlling, decision-making and evaluating.

From a procedural standpoint, planning should occur before any other management functions. Planning involves setting goals, formulating and recommending policy, forecasting and assessing needs and considering alternative strategies for meeting identified needs. It is an attempt to look ahead and to prepare for the future. A good plan is essential to a successful program. As a manager carries out his functions, he continues to plan, choosing and revising his alternatives as necessary in order to achieve the goals of the organization.

Organizing

The organizing function combines the work tasks to be accomplished into homogeneous groups, assigns the work to those who are to accomplish it and delegates the needed authority to accomplish the work assigned. Relationships between individuals and groups and lines of authority are also established in this process. The organizing function usually results in the development of an organization chart reflecting the division of the work, the span of control, the delegation of authority and the flow of communication within the organization.

Staffing

Managers have certain responsibilities for screening, selecting and employing personnel to fill positions that are needed to accomplish the work of the organization. Staffing also involves establishing procedures for replacing and promoting employees, for appraising their performance, for improving their skills and for the development of a compensation system.

Each job or position created should have both a job description and a job specification. The job description describes the duties and responsibilities assigned to the position and clearly indicates to whom the position is to report and what subordinate positions, if any, are to be given supervision. The job specification states the basic requirements of the job in terms of technical, educational and personal characteristics, the pay scale, starting salary and any specific characteristics the person must possess in order to qualify for the job.

Influencing

In order for an organization to accomplish its objectives, the individual employee has to be motivated to achieve the objectives of the job for which each person is responsible. This management function has numerous dimensions such as morale, employee satisfaction, employee productivity, communications and leadership.

Controlling

The controlling function is the process that measures performance against standards and ensures that errors are corrected so that work is accomplished according to expectations. It assumes that those responsible for management can anticipate potential sources of deviation from performance standards and seek means of correction before occurrence, rather than after.

Three basic activities are necessary in setting up an effective control process: standards must be set; performance must be checked against these standards; and corrective action must be taken where needed. In other words, when a deviation occurs, there must be an apparatus for corrective action.

Decision-Making

Decision-making is the selection of choice from among competing alternatives: conscious deliberations by a manager about the alternative ways to use resources available to him. It is conscious effort at discrimination among alternative actions. Decision-making is basic to every function of management and is involved in all management functions. It should be a deliberate process in which the consequences of available alternatives are carefully weighed before a choice is made.

Evaluating

Evaluating is the process of determining the extent to which organizational goals and objectives are being met. It is a continuous process of determining whether or not the courses of action being taken and the performance results achieved are fulfilling the mission and goals of the organization. Every function of management, management activities and events should be under continuous appraisal. Both internal and external audits should be used to evaluate the performance of the organization's performance.

The Behavior Variable

The behavior variables were likewise necessary for the preparation of a competency statement. The behavioral variables are action words (verbs) usually derived from the functions of management. This variable tells what the manager does in his performance of the tasks described in the competency statements. The behavior variable expresses a skill needed for proficiency in the performance of a particular task.

Preparing the Proposed Competency Statements

Two hundred and sixty-four proposed competency statements were derived from the 28 major task areas, seven function variables and the behavior (skill) variables. The competency statement were prepared as follows:

A review of the literature was made: 1) to discover the responsibilities essential to the performance of the work in each of the 28 task areas previously identified from the literature search; and to discover the skills required to implement the functions of management so that these skills could be integrated into statements describing proposed competencies.

In addition, descriptive statements were formulated describing the competencies required for the performance of the chief school business administrators job requirements in behavior terms.

The Proposed Competency Statements

The proposed competency statements are presented below, alphabetically, by major task area, as presented in Table II. A sample of the survey instrument is presented in Appendix I.

GENERAL -- The School Business Administrator:

- 1) Develops a comprehensive plan for the implementation and operation of the school business program.
- 2) Formulates an organizational structure for the management of the school business program.
- 3) Recruits, selects and assigns personnel to positions in the school business program.
- 4) Plans and implements a personnel management system for personnel assigned to the school business program.
- 5) Creates a working climate in which school business employees find personal satisfaction.
- 6) Communicates and informs the staff and others about what the school business program is accomplishing at various levels within the organization.
- 7) Provides communication opportunities for personnel at all levels of the organization to express themselves.
- 8) Coordinates the work activities of the business organization.
- 9) Operates a management control system which verifies that business work activities are conducted in accordance with performance objectives and which corrects activities when they do not meet expectations.
- 10) Provides a system of continuous and periodic appraisal of the school business operation.
- 11) Weighs alternatives and their consequences when making decisions about the school business program.

CAPITAL FUND MANAGEMENT -- The School Business Administrator:

- 1) Determines the fiscal requirements for financing the capital improvement program of the school district.
- 2) Prepares a short and long-range plan for the financing of capital improvements in the school district.
- 3) Determines the methods used to finance capital improvements.
- 4) Prepares the capital improvement budget.
- 5) Communicates and informs the staff and others about the fiscal requirements for needed capital improvements.
- 6) Determines methods and procedures for debt service payments.
- 7) Establishes procedures of accounting for school bond payments and for capital outlay and debt service revenues and expenditures.
- 8) Operates a fiscal control system which monitors capital expenditures and verifies that expenditures are made according to plans.
- 9) Provides a system for the continuous appraisal of the capital funding and debt service program.

CASH MANAGEMENT -- The School Business Administrator:

- 1) Develops a plan for the management of temporarily idle funds in school district accounts.
- 2) Prepares a cash investment program.
- 3) Establishes investment procedures.
- 4) Invests temporarily idle funds in behalf of the school district board of education.
- 5) Monitors the cash investment program.
- 6) Establishes procedures to safeguard the management of funds invested on behalf of the school district.
- 7) Communicates the on-going activities and results of the investment program to the chief school officer and the school district board of education.
- 8) Continually monitors and appraises the investment program

CLASSIFIED PERSONNEL MANAGEMENT -- The School Business Administrator:

- 1) Develops a plan for the management of non-instructional personnel matters of the school district.

- 2) Prepares job specifications and job descriptions for non-instructional personnel employed in the school district.
- 3) Develops a program for the recruitment and appointment of non-instructional personnel employed by the school district.
- 4) Appraises the work loads as well as the adequacy of number of personnel employed to perform non-professional services for the school district.
- 5) Maintains a personnel records system on non-instructional personnel.
- 6) Develops and implements a program for the orientation of new non-instructional personnel.
- 7) Formulates wage and salary programs for non-instructional personnel.
- 8) Develops and monitors the implementation of a program for the evaluation of the performance of non-instructional personnel.
- 9) Develops and implements a systematic program for producing agreement on working conditions, salaries, wages and benefits between the school district and non-instructional employees.
- 10) Continually monitors and evaluates the non-instructional personnel management program.

COMMUNITY RELATIONS -- The School Business Administrator:

- 1) Participates in determining the need for a community relations program involving school business matters.
- 2) Plans a community relations program involving matters pertaining to school business operations.
- 3) Implements a program of public relations.
- 4) Provides the chief school officer, the members of the board of education and staff members with data and information on the business operation of the school district for use in the community relations program.
- 5) Communicates the accomplishments, needs and services of the school business operation to the community.
- 6) Works with local civic, business, parent and other organizations in the interpretation of the total educational program.
- 7) Utilizes the various media in efforts to increase public understanding of the educational and business operations of the school district.

CONSTRUCTION MANAGEMENT -- The School Business Administrator:

- 1) Develops a comprehensive plan for the construction and modernization of school plants in the school district.
- 2) Formulates an organizational structure for the management of the school construction program.
- 3) Recruits, selects and assigns personnel to positions and responsibilities in the school construction program.
- 4) Communicates and informs the staff and others about what the school construction program is accomplishing at various levels within the organization.
- 5) Coordinates the work activities of the school construction program.
- 6) Operates a management control system which keeps the school construction program performing in accordance with expectations.
- 7) Provides a system of continuous and periodic appraisal of the school construction program.
- 8) Weighs alternatives and their consequences when making decisions about the school plant maintenance program.

DATA PROCESSING -- The School Business Administrator:

- 1) Determines the data processing needs of the school business operation.
- 2) Develops a plan for the use of data processing in the storage and retrieval of data for use in the business operations of the school district.
- 3) Recruits, selects and assigns personnel to positions in the data processing program.
- 4) Organizes the data processing staff to perform assigned roles and work activities.
- 5) Communicates and informs the staff and others about the data processing program, its services, needs and accomplishments.
- 6) Coordinates and monitors the work of the data processing program.
- 7) Operates a management control system which keeps the data processing program performing in accordance with expectations.
- 8) Develops and implements a continuing evaluation of the data processing program.

EDUCATIONAL FACILITIES PLANNING -- The School Business Administrator:

- 1) Determines school plant needs of the school district.
- 2) Prepares a comprehensive plan for the development and improvement of educational facilities.
- 3) Prepares educational specifications for proposed new and modernized school plants.
- 4) Organizes the facilities planning staff to perform its assigned roles and work activities.
- 5) Recruits, selects and assigns personnel to the facilities planning program.
- 6) Communicates and informs the staff and others about what the educational facilities planning program is accomplishing.
- 7) Coordinates the work activities of the educational facilities planning program.
- 8) Operates a management control system which verifies that facilities planning work activities are conducted in accordance with expectations and which corrects activities when they do not.
- 9) Provides a system for the continuous appraisal of the educational facilities planning program including the evaluation of educational facilities operated by the school district.
- 10) Weighs alternatives and their consequences when making decisions about the facilities planning program.

EDUCATIONAL RESOURCE MANAGEMENT -- The School Business Administrator:

- 1) Utilizes the process of systematic planning in the school business operation.
- 2) Prepares goals and measurable objectives in cooperation with the chief school officer and lower level management staff for the operation of the school business program.
- 3) Utilizes the techniques of systems analysis in assessing the needs of the business program in the school district.
- 4) Utilizes the program structure of the school district in the preparation of the educational budget document.
- 5) Utilizes the program structure of the school district in the development of a chart of accounts for accounting purposes.
- 6) Prepares a program budget for school district operation.

- 7) Prepares a multi-year program budget as a basis for short term financial planning.
- 8) Evaluates, continuously, the effectiveness of resource allocation and utilization for all school district programs.

FINANCIAL PLANNING AND BUDGETING -- The School Business Administrator:

- 1) Provides a system for the continuous planning of the long term fiscal needs of the school district.
- 2) Organizes school district personnel for the preparation of the educational budget of the school district.
- 3) Coordinates the preparation of the educational budget.
- 4) Reconciles available resources and expected revenues with the fiscal needs of the school district.
- 5) Prepares the budget document.
- 6) Operates a fiscal control system which monitors school expenditures and verifies that expenditures are made in accordance with budgeted expectations.
- 7) Provides a system for the continuous appraisal of the adequacy of the educational budget.
- 8) Continually communicates and informs the school board, the staff and others about the educational budget and its changing status.

FISCAL ACCOUNTING AND FINANCIAL REPORTING -- The School Business Administrator:

- 1) Develops a fiscal accounting system for the school district.
- 2) Prepares an organizational structure for the management of the fiscal accounting system.
- 3) Recruits, selects and assigns personnel to positions in the accounting program.
- 4) Establishes the procedures for classifying fund and receipt accounts.
- 5) Executes the functions and responsibilities as the custodian of school funds.
- 6) Prepares periodic financial reports for the board of education.
- 7) Makes financial reports to the state department of education.

- 8) Keeps the superintendent and board of education informed of the financial condition of the school district.
- 9) Establishes a system of internal accounts.
- 10) Coordinates and monitors the day-to-day operation of the fiscal accounting program.
- 11) Provides for the continuous appraisal of the accounting system.

FISCAL AUDITS AND REPORTS -- The School Business Administrator:

- 1) Develops a plan for determining the effectiveness of internal fiscal controls and the mathematical accuracy, legality, propriety, and completeness of all financial transactions.
- 2) Conducts preaudits to prevent unauthorized or illegal expenditures.
- 3) Provides for a continuous audit to examine fiscal records, transactions, entries and statements for regularity and accuracy.
- 4) Provides for the systematic investigation, verification and critical review of the financial operations of the school district by an independent auditor.
- 5) Reports a summary of the independent audit to the chief school officer and the board of education.
- 6) Evaluates the effectiveness of the overall auditing procedures utilized by the school district.

FOOD SERVICES -- The School Business Administrator:

- 1) Develops a comprehensive plan for the implementation and operation of the food service program.
- 2) Prepares an organizational plan for the management of the food service program including the physical arrangements for preparing and serving food.
- 3) Recruits, selects and assigns personnel to the food service program.
- 4) Coordinates the work activities of the food service program.
- 5) Prepares the budget for the food service program.
- 6) Conducts studies to determine the need for free and/or reduced price lunches.
- 7) Sets the standard and/or reduced prices to be paid for school lunches served by the schools.
- 8) Prepares and distributes the school lunch menu.

- 9) Prepares internal audits of school food service accounts.
- 10) Operates a management control system to verify that food service work activities fulfill requirements.
- 11) Communicates the needs and accomplishments of the food service program to the staff and the general public.
- 12) Coordinates the continuous appraisal of the food service program.

GRANTSMANSHIP — The School Business Administrator:

- 1) Participates in determining the need and potential for obtaining grants to improve education in the school district.
- 2) Maintains a current catalog of agencies which participate in the funding of educational activities.
- 3) Makes contacts with key individuals in public agencies and private foundations who may serve as resource people in the process of securing grants.
- 4) Prepares an annual plan for seeking and obtaining grant funds.
- 5) Encourages school district personnel and others in the community to seek educational grants.
- 6) Prepares and assists with the preparation of grant applications.
- 7) Participates in conferences with proposal team and potential funding agency regarding grant awards.
- 8) Supplies fiscal data needed to complete grant applications and proposals.
- 9) Performs accounting functions relative to grant funds.
- 10) Prepares final reports for submission to funding agency or foundation.
- 11) Continuously evaluates the effectiveness and fiscal value of the grants program to the school district.

INSURANCE AND RISK MANAGEMENT — The School Business Administrator:

- 1) Determines the insurance needs of the school district.
- 2) Prepares a comprehensive plan for the management of the insurance program.
- 3) Assigns responsibilities for the insurance program to personnel on the school business staff.
- 4) Organizes the staff to perform the work activities of the insurance program.

- 5) Communicates and informs the staff and others about the work activities of the school insurance program.
- 6) Coordinates the work activities of the school insurance program.
- 7) Operates a management control system which keeps the school insurance program performing in accordance with expectations.
- 8) Provides for the continuous evaluation of the school insurance program.

LEGAL CONTROL -- The School Business Administrator:

- 1) Participates in the preparation of employment contracts for non-instructional personnel.
- 2) Participates in the selection of the school district attorney.
- 3) Makes recommendations regarding policy matters pertaining to school business affairs.
- 4) Prepares rules, procedures and regulations to implement school board policies and state laws pertaining to business affairs of the school district.
- 5) Participates in resolving legal problems pertaining to the acquisition and sale of school properties.
- 6) Participates in the opening of bids and award of contracts for construction projects and the purchase of furniture, equipment and supplies.
- 7) Reviews and recommends approval of contract documents for construction.
- 8) Makes a continuing assessment of the potential exposure of school district board members, administrative and other personnel to liability and litigation.
- 9) Performs liaison with other government agencies in relation to responsibilities for building codes, health and sanitation, utilities, streets and sidewalks and other such services.

OFFICE MANAGEMENT -- The School Business Administrator:

- 1) Determines the needs of the central school business office.
- 2) Develops plans for the operation of the school business office.
- 3) Prepares an organizational structure for the management of the school business office.
- 4) Recruits, selects and assigns personnel to positions in the school business office.

- 5) Prepares standards and procedures for the operation of the school business office.
- 6) Operates the school business office.
- 7) Designs and controls the design and use of office forms.
- 8) Selects office furniture and equipment for use in the school business operation.
- 9) Monitors and controls the work activities of the school business office.
- 10) Continually evaluates the effectiveness of office management practices.

PAYROLL MANAGEMENT — The School Business Administrator:

- 1) Determines the needs for the establishment of payroll services in the school district.
- 2) Develops the schedule of salary payments.
- 3) Determines whether personal services have been performed.
- 4) Prepares checks or warrants used in salary payments.
- 5) Authorizes the release of salary payments.
- 6) Develops the system for delivering salary payments.
- 7) Supplies accounting office with salary payments data.
- 8) Prepares special reports required for income tax, social security, retirement and so on.
- 9) Continually evaluates the payroll management program and modifies its services as required.

PLANT MAINTENANCE — The School Business Administrator:

- 1) Determines the school plant maintenance needs of the school district.
- 2) Prepares a comprehensive plan for the management of the school plant maintenance program.
- 3) Recruits, selects and assigns personnel to the school plant maintenance program.
- 4) Organizes the school plant maintenance staff to perform the assigned roles and work activities of the maintenance program.
- 5) Communicates and informs the staff and others about what the school plant maintenance program is accomplishing at all levels within the organization.

- 6) Coordinates the work activities of the school plant maintenance program.
- 7) Operates a management control system which keeps the school plant maintenance program performing in accordance with expectations.
- 8) Provides a system of continuous and periodic appraisal of the school plant maintenance program.
- 9) Weighs alternatives and their consequences when making decisions about the school plant maintenance program.

PLANT OPERATIONS -- The School Business Administrator:

- 1) Determines the plant operation needs of the school district.
- 2) Develops a comprehensive plan for the implementation and management of the plant operations program.
- 3) Formulates an organizational structure for the implementation of the plant operations program.
- 4) Recruits, selects and assigns personnel to the plant operations program.
- 5) Communicates and informs the staff and others about what the school plant operations program is accomplishing.
- 6) Coordinates the work activities of the plant operations program.
- 7) Operates a management control system which keeps the school plant, operations program performing in accordance with expectations.
- 8) Provides a system of continuous and periodic appraisal of the plant operations program.
- 9) Considers alternatives and their consequences when making decisions about the school plant operations program.

PLANT SECURITY AND PROTECTION -- The School Business Administrator:

- 1) Prepares a comprehensive plan for the protection and security of school property.
- 2) Organizes a property protection program.
- 3) Recruits, selects and assigns personnel to positions in the property protection program.
- 4) Develops a comprehensive program of fire safety for the schools.

- 5) Provides a comprehensive plant security program.
- 6) Coordinates and monitors the fire safety program.
- 7) Coordinates and monitors the plant security program.
- 8) Develops and monitors a reporting system for the property protection program.
- 9) Communicates the needs and accomplishments of the property protection program.
- 10) Operates a management control system which keeps the property protection program performing in accordance with expectations.
- 11) Coordinates the evaluation of the property protection program.

PROFESSIONAL NEGOTIATIONS — The School Business Administrator:

- 1) Prepares plans for collective negotiations pertaining to non-professional employees.
- 2) Develops negotiations strategies.
- 3) Analyzes and evaluates employee proposals.
- 4) Obtains negotiations recommendations from management personnel.
- 5) Serves as chief negotiator for the management team.
- 6) Directs activities of management's negotiation team.
- 7) Communicates the activities of the negotiation process to the chief school officer, the board of education and other management personnel.
- 8) Interprets the meaning of negotiated contracts to management personnel.
- 9) Continually evaluates the policies, practices and procedures utilized by the management team in the collective negotiations process.

PROPERTY MANAGEMENT — The School Business Administrator:

- 1) Develops a comprehensive plan for a property management program that fulfills the needs of the school district.
- 2) Organizes a property management program.
- 3) Maintains an up-to-date inventory record of school property owned and/or used by the school district.
- 4) Establishes a property accounting system.

- 5) Coordinates and monitors the property accounting system.
- 6) Provides the continuous evaluation of the adequacy of school property owned and/or used by the school district.
- 7) Coordinates and monitors the utilization of school property.
- 8) Makes periodic reports on the status of school properties owned and/or used by the school district.
- 9) Coordinates the continuous appraisal of the property management program.

PURCHASING -- The School Business Administrator:

- 1) Develops a comprehensive plan for purchasing that fulfills the educational goals, instructional needs and service requirements of the school district.
- 2) Cooperates with and assists all levels of the school district organization in determining the supply and equipment needs of the school district.
- 3) Develops an efficient procurement system for requisitioning and purchasing supplies and equipment.
- 4) Coordinates the preparation of specifications for supplies and equipment with budget requirements and the needs of users.
- 5) Designs and utilizes appropriate forms, records and reports to fulfill the requirements of the purchasing function.
- 6) Prepares and utilizes bid documents and contract forms designed to meet desired standards of efficiency and legal requirements.
- 7) Organizes the purchasing staff to perform assigned roles and activities in the purchasing program.
- 8) Communicates and informs school district personnel about the purchasing program and its activities.
- 9) Authorizes the payment of supply and equipment invoices.
- 10) Coordinates and monitors the work activities of the purchasing program.
- 11) Coordinates the preparation of a purchasing calendar to assure the availability of supplies and equipment as needed.
- 12) Continuously appraises the purchasing program and implements changes as needed to improve the efficiency of the program.

STAFF DEVELOPMENT -- The School Business Administrator:

- 1) Determines the need for the continuing education of school business management personnel.
- 2) Plans a continuing program of staff development in the responsibilities performed by school business personnel.
- 3) Organizes the needed staff development program.
- 4) Recruits, selects and assigns personnel to positions in the staff development program.
- 5) Communicates and informs the staff and others about the activities, needs and accomplishments of the staff development program.
- 6) Coordinates the work activities of the staff development program.
- 7) Maintains a management control system that verifies that staff development activities are being conducted according to plan and provides for corrections when not conducted as planned.
- 8) Continuously evaluates the staff development program.

STUDENT ACTIVITY FUNDS -- The School Business Administrator:

- 1) Prepares a district wide plan for the accounting and auditing of school activity or student body funds.
- 2) Develops an organizational structure for the management, accounting and auditing of school activity funds.
- 3) Recommends policies, rules and regulations regarding the management of school activity funds.
- 4) Conducts internal audits of school activity funds.
- 5) Establishes appropriate records and controls for the management of school activity funds.
- 6) Prepares an accounting manual or handbook to guide the management of school activity funds.
- 7) Communicates and informs the staff and others regarding legal and regulatory responsibilities relative to the management of school activity funds.
- 8) Continuously evaluates the management of school activity funds.

TRANSPORTATION SERVICES -- The School Business Administrator:

- 1) Provides a system for the continuous planning of the transportation program.
- 2) Organizes the transportation personnel to perform the work activities of the transportation program.
- 3) Recruits, selects and assigns personnel to positions in the transportation program.
- 4) Develops a comprehensive program of safety for the transportation program.
- 5) Provides repair facilities for the transportation program.
- 6) Develops and monitors a comprehensive routing and bus stop plan.
- 7) Prepares and monitors a bus driver training program.
- 8) Organizes and monitors the school bus maintenance program.
- 9) Communicates and informs school district personnel and the lay public about the transportation program and its activities.
- 10) Coordinates the purchase of transportation equipment, spare parts and supplies.
- 11) Maintains records and accounts for the transportation program.
- 12) Continuously evaluates the transportation program.

WAREHOUSING AND SCHOOL SUPPLY MANAGEMENT -- The School Business Administrator:

- 1) Develops a comprehensive warehousing plan.
- 2) Organizing the warehousing program.
- 3) Recruits, selects and assigns personnel to the warehousing program.
- 4) Organizes the warehousing space and arranges the physical stock in accordance with school district supply and equipment needs.
- 5) Establishes a stock locator system.
- 6) Coordinates and monitors activities designed to provide good storage management.
- 7) Coordinates and monitors warehouse receiving functions.
- 8) Selects and organizes an appropriate warehouse inventory system.

- 9) Conducts a periodic audit of the warehouse stock.
- 10) Prepares a warehouse catalog.
- 11) Organizes and monitors the distribution and delivery of items requisitioned from the warehouse.
- 12) Coordinates the appraisal of the warehousing program.

CHAPTER 5

FINDINGS AND CONCLUSIONS OF THE STUDY

The analysis of data and the findings are presented in direct response to the questions raised in the Introduction. Conclusions are drawn based on the findings. Implications of the study are presented as a basis for future study and analysis.

Question One - To what extent do chief school business administrators agree on selected competency statements? To measure the extent of acceptance of the competency statements, responses to the importance scale were tabulated and stored on computer tape. The data were then processed to determine mean importance scores for each competency statement. Respondents rated the items on a scale from 0-9 (Appendix I). The data from responses to the importance scale are presented in Appendix II. Agreement on a competency statement was achieved when respondents rated a statement as being of average importance or higher. The competency statements rated of high importance were those usually associated with the fiscal activities of the school district and the general management of the school business program. Only four competency statements were rated as either of no importance or of low importance:

- 1) Recruits, selects, and assigns personnel to the warehousing program.
- 2) Organizes the warehousing space and arranges the physical stock in accordance with school district supply and equipment needs.
- 3) Establishes a stock locator system.
- 4) Coordinates and monitors activities designed to provide good storage management.

Question Two - How do chief school business administrators rank the selected competency statements? The mean importance scores are shown in Appendix II and were used to rank competency statements by order of importance. The 10 competency statements that ranked the highest were as follows:

- 1) Coordinates the preparation of the educational budget.
- 2) Reconciles available resources and expected revenues with the fiscal needs of the district.
- 3) Prepares the budget document.
- 4) Provides a system for the continuous planning of the long term fiscal needs of the school district.

- 5) Keeps the superintendent and the board of education informed of the financial condition of the school district.
- 6) Develops a fiscal accounting system for the school district.
- 7) Develops a comprehensive plan for the implementation and operation of the school business program.
- 8) Operates a fiscal control system which monitors school expenditures and verifies that expenditures are made in accordance with budgeted expenditures.
- 9) Continually communicates and informs the school board, the staff and others about the educational budget and its changing status.
- 10) Organizes school district personnel for the preparation of the educational budget of the district.

Table III presents the ranking of the task clusters according to importance scores assigned to competency statements. These data indicate that the task clusters relating to fiscal management are ranked highest in importance and that the warehousing and school supplies management cluster was ranked lowest in importance. Seven task clusters included in the high importance category were:

- 1) Financial planning and budgeting.
- 2) Fiscal accounting and financial reporting.
- 3) Cash management.
- 4) Fiscal audits and reports.
- 5) General management.
- 6) Payroll management.
- 7) Purchasing.

All other clusters except the warehousing and school supply management cluster were included in the "average importance" category.

Question Three - To what extent do chief school business administrators assume responsibility for the performance of activities related to a particular competency? Responses to the responsibility scale on the Competency Statement Instrument (CSI) were tabulated and analyzed to answer this question. By observation of the data in the table included as Appendix III, one can determine the level of responsibility assumed by Chief School Business Administrators for each of the competency statements. The analysis showed that 40% or more of the CSBA's performed activities in the "delegate" or "perform" categories for 75% of the 264 identified competencies.

Table III
 Ranking of Task Clusters
 According to Importance Scores
 Assigned to Competency Statements

Rank	Task Cluster	Importance Score
1	Financial Planning and Budgeting	7.94
2	Fiscal Accounting and Financial Reporting	7.47
3	Cash Management	7.34
4	Fiscal Audits and Reports	7.28
5	General Management	7.18
6	Payroll Management	6.76
7	Purchasing	6.52
8	Insurance and Risk Management	6.40
9	Capital Fund Management	6.35
10	Legal Control	6.28
11	Office Management	6.27
12	Educational Resource Management	6.05
13	Student Activity Funds	5.95
14	Classified Personnel Management	5.92
15	Plant Maintenance	5.80
16	Property Management	5.76
17	Plant Operations	5.69
18	Community Relations	5.66
19	Professional Negotiations	5.59
20	Plant Security and Property Protection	5.46
21	Data Processing	5.46
22	Transportation Services	5.45
23	Construction Management	5.25
24	Food Service	5.19
25	Staff Development	5.14
26	Grantsmanship	4.38
27	Educational Facilities Planning	4.30
28	Warehousing and Supplies Management	3.44

Table IV
Frequency and Percent of Responsibility Responses
By Task Cluster in School Business Administration

Task Cluster	RESPONSIBILITY							
	None		Shares		Delegates		Performs	
	No.	%	No.	%	No.	%	No.	%
General	17	2.06	303	36.73	65	7.88	440	53.33
Educational Facilities Planning	261	34.80	376	50.13	63	8.40	50	6.67
Plant Maintenance	111	16.44	240	35.56	216	32.00	108	16.00
Plant Operations	104	15.41	267	39.56	201	29.78	103	15.26
Construction Management	176	29.33	305	50.83	40	6.67	79	13.17
Financial Planning and Budgeting	8	1.33	164	27.33	68	11.33	360	60.00
Purchasing	18	2.00	173	19.22	244	27.11	465	51.67
Warehousing Supplies Management	298	33.11	128	14.22	395	43.39	79	8.78
Food Service	200	22.22	203	22.56	350	38.89	147	16.33
Transportation Service	236	26.22	164	18.22	369	41.00	131	14.56
Property Management	41	6.07	215	31.85	195	28.89	224	33.19
Fiscal Accounting and Financial Reporting	42	5.09	123	14.91	161	19.52	499	60.59
Personnel Management	115	15.33	373	49.73	139	18.53	123	16.40
Fiscal Audits and Reports	34	7.56	80	17.78	83	18.44	253	56.22
Insurance and Risk Management	34	5.67	155	25.83	86	14.33	325	54.17

Table IV (Continued)
 Frequency and Percent of Responsibility Responses
 By Task Cluster in School Business Administration (continued)

Task Cluster	None		<u>RESPONSIBILITY</u> Shares		Delegates		Performs	
	No.	%	No.	%	No.	%	No.	%
Plant Security and Property Protection	135	16.36	325	39.39	281	34.06	84	10.18
Capital Fund Management	69	10.22	216	32.00	52	7.70	338	50.07
Cash Management	56	9.33	93	15.50	81	13.50	370	61.67
Data Processing	149	24.83	174	29.00	116	19.33	161	25.83
Office Management	34	4.53	224	29.87	115	15.33	377	50.27
Community Relations	107	20.38	301	57.33	19	3.62	98	18.67
Grantsmanship	389	47.15	269	32.61	98	11.88	69	8.36
Payroll Management	27	4.00	145	21.48	283	41.93	220	32.59
Professional Negotiations	256	37.93	319	47.26	11	1.63	89	13.19
Legal Control	99	14.67	333	49.33	35	5.19	208	30.81
Staff Development	122	20.33	260	43.33	47	7.83	171	28.50
Student Activity Funds	95	15.82	146	24.33	124	20.67	235	39.17
Educational Resources Management	87	11.60	256	34.13	70	9.33	337	44.93

Table V
Ranking of Task Clusters According
to Percent of CSBAs Performing
or Delegating Responsibilities

Rank	Task Cluster	% Responsibility ^a
1	Fiscal Accounting and Financial Reporting	80
2	Purchasing	79
3	Fiscal Audits and Reports	75
3	Cash Management	75
3	Payroll Management	75
4	Financial Planning and Budgeting	71
5	Insurance and Risk Management	69
6	Office Management	66
7	Property Management	62
8	General Management	61
9	Student Activity Funds	60
10	Capital Fund Management	58
11	Transportation Services	56
12	Food Service	55
13	Educational Resource Management	54
14	Warehousing and Supplies Management	53
15	Plant Maintenance	48
16	Data Processing	46
17	Plant Operations	45
18	Plant Security and Property Protection	44
19	Legal Control	36
20	Personnel Management	35
21	Community Relations	22
22	Construction Management	20
22	Grantsmanship	20
23	Professional Negotiations	15
23	Educational Facilities Planning	15

^a Performs or delegates.

Table VI
Percent of Responsibility Responses by Task Cluster
Representing No or Shared Responsibilities

Cluster	% Responses ^a
Educational Facilities Planning	84.93
Construction Management	80.16
Plant Operations	54.97
Plant Maintenance	52.00
Plant Security and Property Protection	55.75
Grantsmanship	79.76
Professional Negotiations	85.16
Community Relations	77.71
Staff Development	63.66
Personnel Management	65.06
Data Processing	53.83
Legal Control	64.00

^a "No" responsibility or "shared" responsibility.

The responses were aggregated for the 28 task clusters. These data are reported in Table IV. Table V provides data on the ranks of the task clusters according to CSBAs responses indicating whether they either "perform" or "delegate" the activity associated with the competency statement. It is significant to note that more than 50% of the CSBAs have either "shared" or "no" responsibility for 12 of the task clusters when scores for the competency statements are aggregated. These 12 task clusters are shown in Table VI. These data indicate that other departments or divisions within the district either "share" with the CSBA or "performs" the activity associated with the competency. It should be noted that many of the task clusters listed in Table VI have been considered to be the domain of the chief school business administrator (Linn, 1956; Roe, 1961; Jordan, 1969; Hill, 1970; Candoli, 1973). However, the data analysis strongly suggests a shift in the traditional role of the chief school business administrator. It should be pointed out that some CSBAs still have responsibility for management of all of the clusters identified in the study.

Question Four - When responses of CSBAs are aggregated by task cluster, are there significant differences in the importance of the competency statements that may be due to size of school district? Importance scores were tabulated by task cluster and then divided according to the four categories of school district size established by the amount of the annual budget. The data were analyzed utilizing the ANOVA Analysis of the Statistical Analysis System package.

The analysis revealed that the importance scores for three task clusters were significantly different ($p = .05$) when the school district size varied. Table VII presents the analysis of variance data. The CSBAs from the smaller school districts rated the three fiscal management clusters higher in importance than did the CSBAs of larger districts. There were no significant differences in the 25 other task clusters due to responses from CSBAs from different size school districts.

Table VII

Analyses of Variance Summary
Importance Scores by Task Cluster According to Size of School District

Task Cluster	Degree of Freedom	Sum of Squares	F Value
Financial Planning and Budgeting	3	6.79769880	3.27*
Purchasing	3	11.54901624	3.73*
Fiscal Accounting and Financial Reporting	3	22.71848466	4.06*

* Significant at the .05 level.

Table VIII displays the group means of the importance scores assigned by the CSBAs. The mean scores decrease over the four categories of district size for the task clusters indicated above.

Question Five - If responses of CSBAs are aggregated by task cluster, are there significant differences in the responsibility scores that relate to a particular competency statement that may be due to the size of school district? The responsibility scores were summed by task cluster and mean scores were treated by use of the analysis of variance statistic to determine if significant differences existed between size groups. The annual operating budget size groups were used. Statistically significant differences were found for all task clusters except "school property management" and "data processing." This finding indicates there are differences in the way CSBAs manage their programs in different size school districts. The larger the school district size, the greater the likelihood that responsibility for the task clusters will be delegated if the CSBA has responsibility. On the other hand, the tendency is for the CSBAs in smaller school districts to "perform" the responsibility rather than "delegate" it.

Question Six - If importance scores are aggregated by task cluster, are there differences in the mean importance scores assigned to selected task clusters by CSBAs in school districts with or without capital budgets? If differences existed, it was hypothesized that they would be demonstrated for those task clusters normally associated with a school building program which would include:

- 1) Educational Facilities Planning.
- 2) Construction Management.
- 3) Capital Fund Management.
- 4) Cash Management.

However, when the mean importance scores for the indicated task clusters were analyzed by using the analysis of variance procedure, no significant differences in importance scores were found. The CSBAs who managed capital budgets and those who did not perceived no differences in the importance of the listed task clusters.

Question Seven - Are there differences in the importance response scores of CSBAs by responsibility category for major task clusters in districts with or without capital budgets? The data were analyzed by use of the Pearson r to determine relationships of CSBAs responses to importance scores in districts with capital budgets and those without. The Pearson r was run for each responsibility category. The .05 level was used to determine significance. No differences were found for the "performs" and "shares" categories. Significant differences were found for 19 task clusters in the "delegates" category. Significant differences were found in the importance scores of the following task clusters:

- 1) Plant Operations
- 2) Construction Management
- 3) Financial Planning and Budgeting
- 4) Purchasing

- 5) Warehousing and Supplies Management
- 6) Transportation Service
- 7) Property Management
- 8) Fiscal Accounting and Financial Reporting
- 9) Fiscal Audits and Reports
- 10) Insurance and Risk Management
- 11) Plant Security and Property Protection
- 12) Capital Fund Management
- 13) Cash Management
- 14) Data Processing
- 15) Payroll Management
- 16) Legal Control
- 17) Staff Development
- 18) Student Activity Funds
- 19) Educational Resource Management

Conclusions

Seven questions were raised in this study in addition to the principal research question. Conclusions are drawn in direct response to each of the questions.

- 1) Two hundred and sixty competency statements in 28 task clusters were accepted as being important to the CSBAs. Likewise, 27 of the 28 task clusters were accepted as being important. The task cluster rated low in importance was the "Warehousing and Supplies Management" cluster.
- 2) The fiscal related competencies were ranked the highest in the competency list. Likewise, the fiscal related task clusters were perceived to be the most important to the CSBAs. There were two exceptions-- "Capital Fund Management" and "Student Activity Funds."
- 3) CSBAs do not have full responsibility for the competencies included in 12 of the 28 task clusters. Task clusters related to facilities planning and management, personnel management, data processing, grantsmanship, staff development, professional negotiations and community relations have become highly specialized areas. Consequently, district organization patterns have removed many of these tasks from the school

Table VIII

Mean Importance Scores of Competency Statements by District Size
Accumulated by Task Cluster in School Business Administration

Task Cluster	<u>Number of Cases and Mean Importance Scores by Size</u>							
	<u>Size Group I</u>		<u>Size Group II</u>		<u>Size Group III</u>		<u>Size Group IV</u>	
	%	Mean	%	Mean	%	Mean	%	Mean
1. General	24	7.08	22	7.21	14	7.32	14	7.14
2. Educational Facilities Planning	24	3.84	22	4.47	14	4.78	14	4.21
3. Plant Maintenance	24	5.50	22	6.13	14	6.32	14	5.23
4. Plant Operations	24	5.60	22	5.88	14	5.94	14	5.22
5. Construction Management	24	5.30	22	5.24	14	5.45	14	4.87
6. Financial Planning and Budgeting	24	8.25	22	8.10	14	7.56	14	7.56
7. Purchasing *	24	6.96	22	6.64	14	6.11	14	5.98
8. Warehousing and Supplies Management	24	3.15	22	3.61	14	3.43	14	3.54
9. Food Service	24	4.66	22	5.53	14	5.32	14	5.32
10. Transportation Service	24	4.99	22	5.86	14	5.29	14	5.63
11. Property Management	24	6.05	22	5.66	14	5.25	14	5.82
12. Fiscal Accounting and Financial Reporting *	24	7.70	22	8.04	14	6.51	14	7.16
13. Personnel Management	24	5.91	22	6.61	14	5.57	14	5.11
14. Fiscal Audits and Reports	24	7.10	22	7.67	14	7.31	14	6.93

* Differences significant at .05 level of probability.

Table VIII (continued)

Mean Importance Scores of Competency Statements by District SizeAccumulated by Task Cluster in School Business Administration (continued)

Task Cluster	<u>Number of Cases and Mean Importance Scores by Size</u>							
	<u>Size Group I</u>		<u>Size Group II</u>		<u>Size Group III</u>		<u>Size Group IV</u>	
	%	Mean	%	Mean	%	Mean	%	Mean
15. Insurance and Risk Management	24	6.18	22	6.57	14	6.31	14	6.57
16. Plant Security and Property Protection	24	5.37	22	5.34	14	5.85	14	5.34
17. Capital Fund Management	24	6.31	22	6.60	14	6.06	14	6.24
18. Cash Management	24	7.71	22	7.26	14	6.81	14	7.29
19. Data Processing	24	5.45	22	5.43	14	5.20	14	5.67
20. Office Management	24	6.23	22	6.56	14	6.19	14	5.93
21. Community Relations	24	4.97	22	6.05	14	5.95	14	5.83
22. Grantsmanship	24	4.53	22	4.17	14	4.61	14	4.01
23. Payroll Management	24	6.85	22	7.15	14	6.31	14	6.43
24. Personnel Negotiations	24	6.12	22	5.88	14	4.62	14	5.06
25. Legal Control	24	6.32	22	6.52	14	6.17	14	5.92
26. Staff Development	24	4.72	22	5.32	14	5.80	14	4.78
27. Student Activity Funds	24	5.63	22	6.22	14	6.41	14	5.49
28. Educational Resources Management	24	5.84	22	6.30	14	5.94	14	6.03

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business division's responsibility and placed them under the control of separate departments or divisions. Some of these tasks have long been a part of the traditional role of school business service units in school districts. Role changes are clearly indicated by these data.

4) CSBAs from smaller school districts perceive selected fiscal management competencies to be more important than other competencies in the list. The task clusters were "Financial Planning and Budgeting," "Purchasing," and "Fiscal Accounting and Financial Reporting."

5) CSBAs in different size school districts assume different levels of responsibility for activities related to the competency statements. CSBAs in smaller school districts tend to "perform" more activities related to competencies than "delegates;" whereas, CSBAs in larger school districts tended to "delegate" more.

6) CSBAs in school districts who managed capital budgets have similar perceptions regarding the importance of the competency statements to those who had no capital budget.

7) When CSBAs delegated responsibilities for activities related to competencies were analyzed, there were differences between CSBAs responses of the importance of competencies in districts with capital budgets and those without. Therefore, the presence of a capital budget was associated with how important CSBAs rated competencies for 19 of the 28 task clusters.

APPENDIX I:

THE COMPETENCY STATEMENT INSTRUMENT

The following pages present the instructions that accompanied the Competency Statement Instrument (CSI) which listed the proposed Competencies that were used as the basis for this publication. Following the instruction sheets are three sample pages of the actual CSI. The proposed competency statements are presented within the text by major task area.

INSTRUCTIONS

Competency Statement Instrument
Proposed Competencies for the
Chief School Business AdministratorI. Purpose

This instrument is the first of three you will receive for careful consideration. The major purpose of this study is to determine if chief school business officials are agreed on the major responsibilities of the position they hold and on statements representing competencies which they believe are needed to perform those responsibilities.

II. Procedures

A modified form of the Delphi Technique is being used. It is expected that at least three probes will be mailed to each respondent. Consequently, it is expected that you will receive three mailings of the instrument with feedback of group response data subsequent to each mailing. You are asked to respond to the best of your ability to the contents of each instrument. Your cooperation in checking and returning each instrument quickly will ensure the successful completion of the study. We believe that you are making a significant contribution to school business management research through your participation in this study.

III. Instructions

Proposed competency statements are listed in 28 different responsibility categories on the Competency Statement Instrument (CSI). A careful search of the literature was completed in order to prepare the list of competency statements in their present form. You may or may not agree that the proposed statements are important to the performance of the responsibilities of the Chief School Business Administrator. You are requested to indicate your opinion on the CSI.

The CSI has two scales--an "Importance Scale" and a "Responsibility Scale:"

- A. The Responsibility Scale consists of four response categories. Please draw a circle around the number on the scale that represents your present responsibility status on the item. The following is an explanation of each of the four categories:

0 - No responsibility:

The Chief School Business Administrator has no responsibility.

1 - Shares (responsibility)

The Chief School Business Administrator shares responsibility with another department or division in the school district or with another agency.

2 - Delegates (responsibility):

The Chief School Business Administrator delegates to a lower level administrator who is a subordinate manager in the school business operation.

3 - Performs (responsibility):

The Chief School Business Administrator has direct performance responsibility. He may or may not perform the behavior implied in the statement but he has no managerial or supervisory subordinate to whom he can delegate; therefore, he either performs or directs the activity implied in the statement.

- B. The Importance Scale consists of four major response categories. Please draw a circle around the number on the Importance Scale that represents your opinion regarding the importance of the item to the performance of your responsibilities. Please note that it does not matter what your job description may include. What does matter is your opinion about the importance of the content of the competency statement in the performance of your responsibilities.

In addition to circling the appropriate number on the above scales, please respond to the list of statements by either adding additional statements or making revisions to statements listed. Please do this on a separate page and return to the Researcher together with the completed Competency Statement Instrument.

An envelope with return address has been included for your convenience in returning your response. Your assistance is greatly appreciated.

8/4/77
C. W. McGuffey
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SAMPLE OF PROPOSED COMPETENCY STATEMENTS FOR THE CHIEF SCHOOL BUSINESS ADMINISTRATOR

Showing Rating Scale Used to Determine Importance of Statements

Performs	Delegates	Shares	No Responsibility	Competency Statement	No Importance	Low Importance	Average Importance	High Importance
				<u>General</u>				
3	2	1	0	1. Develops a comprehensive plan for the implementation and operation of the school business program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	2. Formulates an organizational structure for the management of the school business program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	3. Recruits, selects and assigns personnel to positions in the school business program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	4. Plans and implements a personnel management system for personnel assigned to the school business program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	5. Creates a working climate in which school business employees find personal satisfaction.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	6. Communicates and informs the staff and others about what the school business program is accomplishing at various levels within the organization.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	7. Provides communication opportunities for personnel at all levels of the organization to express themselves.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	8. Coordinates the work activities of the business organization.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	9. Operates a management control system which verifies that business work activities are conducted in accordance with performance objectives and which corrects activities when they do not meet expectations.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	10. Provides a system of continuous and periodic appraisal of the school business operation.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	11. Weighs alternatives and their consequences when making decisions about the school business program.	0	1 2 3	4 5 6	7 8 9
				<u>Educational Facilities Planning</u>				
3	2	1	0	1. Determines school plant needs of the school district.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	2. Prepares a comprehensive plan for the development and improvement of educational facilities.	0	1 2 3	4 5 6	7 8 9

SAMPLE OF PROPOSED COMPETENCY STATEMENTS WITH RATING SCALE -- 2

Performs	Delegates	Shares	No Responsibility	Competency Statement	No Importance	Low Importance	Average Importance	High Importance
3	2	1	0	3. Prepares educational specifications for proposed new and modernized school plants.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	4. Organizes the facilities planning staff to perform its assigned roles and work activities.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	5. Recruits, selects and assigns personnel to the facilities planning program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	6. Communicates and informs the staff and others about what the educational facilities planning program is accomplishing.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	7. Coordinates the work activities of the educational facilities planning program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	8. Operates a management control system which verifies that facilities planning work activities are conducted in accordance with expectations and which corrects activities when they do not	0	1 2 3	4 5 6	7 8 9
3	2	1	0	9. Provides a system for the continuous appraisal of the educational facilities planning program including the evaluation of educational facilities operated by the school district.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	10. Weighs alternatives and their consequences when making decisions about the facilities planning program.				
<u>Plant Maintenance</u>								
3	2	1	0	1. Determines the school plant maintenance needs of the school district.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	2. Prepares a comprehensive plan for the management of the school plant maintenance program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	3. Recruits, selects and assigns personnel to the school plant maintenance program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	4. Organizes the school plant maintenance staff to perform the assigned roles and work activities of the maintenance program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	5. Communicates and informs the staff and others about what the school plant maintenance program is accomplishing at all levels within the organization.	0	1 2 3	4 5 6	7 8 9

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SAMPLE OF PROPOSED COMPETENCY STATEMENTS WITH RATING SCALE -- 3

Performs	Delegates	Shares	No Responsibility	Competency Statement	No Importance	Low Importance	Average Importance	High Importance
3	2	1	0	6. Coordinates the work activities of the school plant maintenance program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	7. Operates a management control system which keeps the school plant maintenance program performing in accordance with expectations.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	8. Provides a system of continuous and periodic appraisal of the school plant maintenance program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	9. Weighs alternatives and their consequences when making decisions about the school plant maintenance program.	0	1 2 3	4 5 6	7 8 9
				<u>Plant Operations</u>				
3	2	1	0	1. Determines the plant operation needs of the school district.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	2. Develops a comprehensive plan for the implementation and management of the plant operations program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	3. Formulates an organizational structure for the implementation of the plant operations program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	4. Recruits, selects and assigns personnel to the plant operations program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	5. Communicates and informs the staff and others about what the school plant operations program is accomplishing.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	6. Coordinates the work activities of the plant operations program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	7. Operates a management control system which keeps the school plant operations program performing in accordance with expectations.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	8. Provides a system of continuous and periodic appraisal of the plant operations program.	0	1 2 3	4 5 6	7 8 9
3	2	1	0	9. Considers alternatives and their consequences when making decisions about the school plant operations program.	0	1 2 3	4 5 6	7 8 9

APPENDIX II:

Importance Scores Based on Respondent
Responses of Competency Statements
FOR THE CHIEF SCHOOL BUSINESS ADMINISTRATOR

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF
COMPETENCY STATEMENTS FOR CHIEF SCHOOL BUSINESS ADMINISTRATORS

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
<u>General</u>				
1. Develops a comprehensive plan for the implementation and operation of the school business program.			7.873	
2. Formulates an organizational structure for the management of the school business program.			7.667	
3. Recruits, selects and assigns personnel to positions in the school business program.			7.387	
4. Plans and implements a personnel management system for personnel assigned to the school business program.			6.893	
5. Creates a working climate in which school business employees find personal satisfaction.			7.490	
6. Communicates and informs the staff and others about what the school business program is accomplishing at various levels within the organization.			6.533	
7. Provides communication opportunities for personnel at all levels of the organization to express themselves.			6.653	
8. Coordinates the work activities of the business organization.			7.213	
9. Operates a management control system which verifies that business work activities are conducted in accordance with performance objectives and which corrects activities when they do not meet expectations.			6.613	
10. Provides a system of continuous and periodic appraisal of the school business operation.			7.093	
11. Weighs alternatives and their consequences when making decisions about the school business program.			7.507	
<u>Educational Facilities Planning</u>				
1. Determines school plant needs of the school district.		6.227		
2. Prepares a comprehensive plan for the development and improvement of educational facilities.		5.880		

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 2

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
3. Prepares educational specifications for proposed new and modernized school plants.			4.707	
4. Organizes the facilities planning staff to perform its assigned roles and work activities.			4.640	
5. Recruits, selects and assigns personnel to the facilities planning program.			4.493	
6. Communicates and informs the staff and others about what the educational facilities planning program is accomplishing.			4.227	
7. Coordinates the work activities of the educational facilities planning program.			4.040	
8. Operates a management control system which verifies that facilities planning work activities are conducted in accordance with expectations and which corrects activities when they do not			4.467	
9. Provides a system for the continuous appraisal of the educational facilities planning program including the evaluation of educational facilities operated by the school district.			4.347	
10. Weighs alternatives and their consequences when making decisions about the facilities planning program.				
<u>Plant Maintenance</u>				
1. Determines the school plant maintenance needs of the school district.			6.120	
2. Prepares a comprehensive plan for the management of the school plant maintenance program.			5.830	
3. Recruits, selects and assigns personnel to the school plant maintenance program.			4.706	
4. Organizes the school plant maintenance staff to perform the assigned roles and work activities of the maintenance program.			4.640	
5. Communicates and informs the staff and others about what the school plant maintenance program is accomplishing at all levels within the organization.			4.493	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 3

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
6. Coordinates the work activities of the school plant maintenance program.			4.227	
7. Operates a management control system which keeps the school plant maintenance program performing in accordance with expectations.			4.040	
8. Provides a system of continuous and periodic appraisal of the school plant maintenance program.			4.467	
9. Weighs alternatives and their consequences when making decisions about the school plant maintenance program.			4.347	
<u>Plant Operations</u>				
1. Determines the plant operation needs of the school district.			6.013	
2. Develops a comprehensive plan for the implementation and management of the plant operations program.			5.920	
3. Formulates an organizational structure for the implementation of the plant operations program.			5.693	
4. Recruits, selects and assigns personnel to the plant operations program.			5.887	
5. Communicates and informs the staff and others about what the school plant operations program is accomplishing.			5.213	
6. Coordinates the work activities of the plant operations program.			5.427	
7. Operates a management control system which keeps the school plant operations program performing in accordance with expectations.			5.587	
8. Provides a system of continuous and periodic appraisal of the plant operations program.			5.813	
9. Considers alternatives and their consequences when making decisions about the school plant operations program.			5.960	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 4

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
<u>Construction Management</u>				
1. Develops a comprehensive plan for the construction and modernization of school plants in the school district.			5.427	
2. Formulates an organizational structure for the management of the school construction program.			5.73	
3. Recruits, selects and assigns personnel to positions and responsibilities in the school construction program.			4.947	
4. Communicates and informs the staff and others about what the school construction program is accomplishing at various levels within the organization.			4.840	
5. Coordinates the work activities of the school construction program.			5.240	
6. Operates a management control system which keeps the school construction program performing in accordance with expectations.			5.387	
7. Provides a system of continuous and periodic appraisal of the school construction program.			5.320	
8. Weighs alternatives and their consequences when making decisions about the school plant maintenance program.			5.680	
<u>Financial Planning and Budgeting</u>				
1. Provides a system for the continuous planning of the long term fiscal needs of the school district.				8.953
2. Organizes school district personnel for the preparation of the educational budget of the school district.				7.893
3. Coordinate the preparation of the educational budget.				8.126
4. Reconciles available resources and expected revenues with the fiscal needs of the school district.				8.080
5. Prepares the budget document.				8.067

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 5

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
6. Operates a fiscal control system which monitors school expenditures and verifies that expenditures are made in accordance with budgeted expenditures.				7.973
7. Provides a system for the continuous appraisal of the adequacy of the educational budget.				7.373
8. Continually communicates and informs the school board, the staff and others about the educational budget and its changing status.				7.933
<u>Purchasing</u>				
1. Develops a comprehensive plan for purchasing that fulfills the educational goals, instructional needs and service requirements of the school district.				7.173
2. Cooperates with and assists all levels of the school district organization in determining the supply and equipment needs of the school district.				6.880
3. Develops an efficient procurement system for requisitioning and purchasing supplies and equipment.				7.293
4. Coordinates the preparation of specifications for supplies and equipment with budget requirements and the needs of users.				7.067
5. Designs and utilizes appropriate forms, records and reports to fulfill the requirements of the purchasing function.				6.747
6. Prepares and utilizes bid documents and contract forms designed to meet desired standards of efficiency and legal requirements.				7.187
7. Organizes the purchasing staff to perform assigned roles and activities in the purchasing program.				6.653
8. Communicates and informs school district personnel about the purchasing program and its activities.			6.400	
9. Authorizes the payment of supply and equipment invoices.				7.173
10. Coordinates and monitors the work activities of the purchasing program.				6.920

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 6

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
11. Coordinates the preparation of a purchasing calendar to assure the availability of supplies and equipment as needed.			4.653	
12. Continuously appraises the purchasing program and implements changes as needed to improve the efficiency of the program.			4.147	
<u>Warehousing and Supplies Management</u>				
1. Develops a comprehensive warehousing plan.			4.680	
2. Organizes the warehousing program.			5.960	
3. Recruits, selects and assigns personnel to the warehousing program.	0.973			
4. Organizes the warehousing space and arranges the physical stock in accordance with school district supply and equipment needs.		1.040		
5. Establishes a stock locator system.	0.853			
6. Coordinates and monitors activities designed to provide good storage management.	0.933			
7. Coordinates and monitors warehouse receiving functions.			4.520	
8. Selects and organizes an appropriate warehouse inventory system.			4.597	
9. Conducts a periodic audit of the warehouse stock.			4.760	
10. Prepares a warehouse catalog.		3.987		
11. Organizes and monitors the distribution and delivery of items requisitioned from the warehouse.			4.400	
12. Coordinates the appraisal of the warehousing program.			4.533	
<u>Food Service</u>				
1. Develops a comprehensive plan for the implementation and operation of the food service program.			5.787	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 7

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
2. Prepares an organizational plan for the management of the food service program including the physical arrangements for preparing and serving food.			5.307	
3. Recruits, selects and assigns personnel to the food service program.			5.267	
4. Coordinates the work activities of the food service program.			5.093	
5. Prepares the budget for the food service program.			5.787	
6. Conducts studies to determine the need for free and/or reduce price lunches.			4.797	
7. Sets the standard and/or reduce prices to be paid for school lunches served by the schools.			4.640	
8. Prepares and distributes the school lunch menu.			4.080	
9. Prepares internal audits of school food service accounts.			5.667	
10. Operates a management control system to verify that food service work activities fulfill requirements.			5.267	
11. Communicates the needs and accomplishments of the food service program to the staff and the general public.			5.040	
12. Coordinates the continuous appraisal of the food service program.			5.587	
<u>Transportation Services</u>				
1. Provides a system for the continuous planning of the transportation program.			6.120	
2. Organizes the transportation personnel to perform the work activities of the transportation program.			5.453	
3. Recruits, selects and assigns personnel to positions in the transportation program.			5.427	
4. Develops a comprehensive program of safety for the transportation program.			5.920	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 8

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
5. Provides repair facilities for the transportation program.			4.720	
6. Develops and monitors a comprehensive routing and bus stop plan.			5.213	
7. Prepares and monitors a bus driver training program.			5.427	
8. Organizes and monitors the school bus maintenance program.			5.040	
9. Communicates and informs school district personnel and the lay public about the transportation program and its activities.			5.267	
10. Coordinates the purchase of transportation equipment, spare parts and supplies.			5.000	
11. Maintains records and accounts for the transportation program.			5.653	
12. Continuously evaluates the transportation program.			6.107	
<u>Property Management</u>				
1. Develops a comprehensive plan for a property management program that fulfills the needs of the school district.			5.973	
2. Organizes a property management program.			5.747	
3. Maintains an up-to-date inventory record of school property owned and/or used by the school district.			6.027	
4. Establishes a property accounting system.			5.707	
5. Coordinates and monitors the property accounting system.			5.587	
6. Provides the continuous evaluation of the adequacy of school property owned and/or used by the school district.			5.747	
7. Coordinates and monitors the utilization of school property.			5.640	
8. Makes periodic reports on the status of school properties owned and/or used by the school district.			5.720	
9. Coordinates the continuous appraisal of the property management program.			5.653	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 9

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
<u>Fiscal Accounting and Financial Reporting</u>				
1. Develops a fiscal accounting system for the school district.				7.987
2. Prepares an organizational structure for the management of the fiscal accounting system.				7.387
3. Recruits, selects and assigns personnel to positions in the accounting program.				7.147
4. Establishes the procedures for classifying fund and receipt accounts.				7.147
5. Executes the functions and responsibilities as the custodian of school funds.				7.533
6. Prepares periodic financial reports for the board of education.				7.600
7. Makes financial reports to the state department of education.				7.387
8. Keeps the superintendent and board of education informed of the financial condition of the school district.				8.027
9. Establishes a system of internal accounts.				7.373
10. Coordinates and monitors the day-to-day operation of the fiscal accounting program.				7.227
11. Provides for the continuous appraisal of the accounting system.				7.373
<u>Classified Personnel Management</u>				
1. Develops a plan for the management of non-instructional personnel matters of the school district.			6.173	
2. Prepares job specifications and job descriptions for non-instructional personnel employed in the school district.			5.933	
3. Develops a program for the recruitment and appointment of non-instructional personnel employed by the school district.			5.667	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 10

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
4. Appraises the work loads as well as the adequacy of number of personnel employed to perform non-professional services for the school district.			5.667	
5. Maintains a personnel records system on non-instructional personnel.			5.653	
6. Develops and implements a program for the orientation of new non-instructional personnel.			5.547	
7. Formulates wage and salary programs for non-instructional personnel.			6.293	
8. Develops and monitors the implementation of a program for the evaluation of the performance of non-instructional personnel.			5.747	
9. Develops and implements a systematic program for producing agreement on working conditions, salaries, wages and benefits between the school district and non-instructional employees.			6.413	
10. Continually monitors and evaluates the non-instructional personnel management program.			6.133	
<u>Fiscal Audits and Reports</u>				
1. Develops a plan for determining the effectiveness of internal fiscal controls and the mathematical accuracy, legality, propriety, and completeness of all financial transactions.				7.587
2. Conducts preaudits to prevent unauthorized or illegal expenditures.				7.107
3. Provides for a continuous audit to examine fiscal records, transactions, entries and statements for regularity and accuracy.				7.213
4. Provides for the systematic investigation, verification and critical review of the financial operations of the school district by an independent auditor.				7.507
5. Reports a summary of the independent audit to the chief school officer and the board of education.				7.347
6. Evaluates the effectiveness of the overall auditing procedures utilized by the school district.				6.933

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 11

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
<u>Insurance and Risk Management</u>				
1. Determines the insurance needs of the school district.				7.333
2. Prepares a comprehensive plan for the management of the insurance program.				6.840
3. Assigns responsibilities for the insurance program to personnel on the school business staff.			6.013	
4. Organizes the staff to perform the work activities of the insurance program.			6.053	
5. Communicates and informs the staff and others about the work activities of the school insurance program.			5.773	
6. Coordinates the work activities of the school insurance program.			6.013	
7. Operates a management control system which keeps the school insurance program performing in accordance with expectations.			6.307	
8. Provides for the continuous evaluation of the school insurance program.				6.933
<u>Plant Security and Property Protection</u>				
1. Prepares a comprehensive plan for the protection and security of school property.			5.920	
2. Organizes a property protection program.			5.533	
3. Recruits, selects and assigns personnel to positions in the property protection program.			5.080	
4. Develops a comprehensive program of fire safety for the schools.			5.880	
5. Provides a comprehensive plant security program.			5.680	
6. Coordinates and monitors the fire safety program.			5.600	
7. Coordinates and monitors the plant security program.			5.747	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 12

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
8. Develops and monitors a reporting system for the property protection program.			5.240	
9. Communicates the needs and accomplishments of the property protection program.			5.027	
10. Operates a management control system which keeps the property protection program performing in accordance with expectations.			5.120	
11. Coordinates the evaluation of the property protection program.			5.307	
<u>Debt Service and Capital Fund Management</u>				
1. Determines the fiscal requirements for financing the capital improvement program of the school district.				6.640
2. Prepares a short and long range plan for the financing of capital improvements in the school district.			6.427	
3. Determines the methods used to finance capital improvements.			6.227	
4. Prepares the capital improvement budget.				6.800
5. Communicates and informs the staff and others about the fiscal requirements for needed capital improvements.			5.907	
6. Determines methods and procedures for debt service payments.			6.186	
7. Establishes procedures of accounting for school bond payments and for capital outlay and debt service revenues and expenditures.			6.307	
8. Operates a fiscal control system which monitors capital expenditures and verifies that expenditures are made according to plans.				6.653
9. Provides a system for the continuous appraisal of the capital funding and debt service program.			6.067	
<u>Cash Management</u>				
1. Develops a plan for the management of temporarily idle funds in school district accounts.				7.693

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 13

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
2. Prepares a cash investment program.				7.400
3. Establishes investment procedures.				7.280
4. Invests temporarily idle funds in behalf of the school district board of education.				7.387
5. Monitors the cash investment program.				7.427
6. Establishes procedures to safeguard the management of funds invested on behalf of the school district.				7.293
7. Communicates the on-going activities and results of the investment program to the chief school officer and the school district board of education.				7.093
8. Continually monitors and appraises the investment program.				7.173
<u>Data Processing</u>				
1. Determines the data processing needs of the school business operation.			6.227	
2. Develops a plan for the use of data processing in the storage and retrieval of data for use in the business operations of the school district.			5.947	
3. Recruits, selects and assigns personnel to positions in the data processing program.			5.413	
4. Organizes the data processing staff to perform assigned roles and work activities.			5.227	
5. Communicates and informs the staff and others about the data processing program, its services, needs and accomplishments.			5.053	
6. Coordinates and monitors the work of the data processing program.			4.933	
7. Operates a management control system which keeps the data processing program performing in accordance with expectations.			5.373	
8. Develops and implements a continuing evaluation of the data processing program.			5.480	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 14

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
<u>Office Management</u>				
1. Determine the needs of the central school business office.				6.560
2. Develops plans for the operation of the school business office.			6.493	
3. Prepares an organizational structure for the management of the school business office.			6.200	
4. Recruits, selects and assigns personnel to positions in the school business office.			6.427	
5. Prepares standards and procedures for the operation of the school business office.				6.560
6. Operates the school business office.				6.680
7. Designs and controls the design and use of office forms.			5.800	
8. Selects office furniture and equipment for use in the school business operation.			5.080	
9. Monitors and controls the work activities of the school business office.			6.333	
10. Continually evaluates the effectiveness of office management practices.				6.573
<u>Community Relations</u>				
1. Participates in determining the need for a community relations program involving school business matters.			5.787	
2. Plans a community relations program involving matters pertaining to school business operations.			5.467	
3. Implements a program of public relations.			5.333	
4. Provides the chief school officer, the members of the board of education and staff members with data and information on the business operation of the school district for use in the community				

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 15

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
relations program.			5.947	
5. Communicates the accomplishments, needs and services of the school business operation to the community.			5.413	
6. Works with local civic, business, parent and other organizations in the interpretation of the total educational program.			5.826	
7. Utilizes the various media in efforts to increase public understanding of the educational and business operations of the school district.			5.813	
<u>Grantsmanship</u>				
1. Participates in determining the need and potential for obtaining grants to improve education in the school district.			4.600	
2. Maintains a current catalog of agencies which participate in the funding of educational activities.		3.600		
3. Makes contacts with key individuals in public agencies and private foundations who may serve as resource people in the process of securing grants.		3.773		
4. Prepares an annual plan for seeking and obtaining grant funds.		3.600		
5. Encourages school district personnel and others in the community to seek educational grants.		3.827		
6. Prepares and assists with the preparation of grant applications.			4.280	
7. Participates in conferences with proposal team and potential funding agency regarding grant awards.			4.086	
8. Supplies fiscal data needed to complete grant applications and proposals.			5.120	
9. Performs accounting functions relative to grant funds.			5.213	
10. Prepares final reports for submission to funding agency or foundation.			5.307	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 16

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
11. Continuously evaluates the effectiveness and fiscal value of the grants program to the school district.			4.773	
<u>Payroll Management</u>				
1. Determines the needs for the establishment of payroll services in the school district.				7.187
2. Develops the schedule of salary payments.				6.573
3. Determines whether personal services have been performed.				6.520
4. Prepares checks or warrants used in salary payments.				6.720
5. Authorizes the release of salary payments.				6.867
6. Develops the system for delivering salary payments.			6.373	
7. Supplies accounting office with salary payments data.				6.733
8. Prepares special reports required for income tax, social security, retirement and so on.				6.973
9. Continually evaluates the payroll management program and modifies its services as required.				6.920
<u>Professional Negotiations</u>				
1. Prepares plans for collective negotiations pertaining to non-professional employees.			5.290	
2. Develops negotiations strategies.			5.773	
3. Analyzes and evaluates employee proposals.			5.973	
4. Obtains negotiations recommendations from management personnel.			5.653	
5. Serves as chief negotiator for the management team.			4.720	
6. Directs activities of management's negotiation team.			5.080	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 17

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
7. Communicates the activities of the negotiation process to the chief school officer, the board of education and other management personnel.			5.573	
8. Interprets the meaning of negotiated contracts to management personnel.			5.693	
9. Continually evaluates the policies, practices and procedures utilized by the management team in the collective negotiations process.			5.907	
<u>Legal Control</u>				
1. Participates in the preparation of employment contracts for non-instructional personnel.			5.720	
2. Participates in the selection of the school district attorney.			5.280	
3. Makes recommendations regarding policy matters pertaining to school business affairs.				7.027
4. Prepares rules, procedures and regulations to implement school board policies and state laws pertaining to business affairs of the school district.				7.027
5. Participates in resolving legal problems pertaining to the acquisition and sale of school properties.			5.920	
6. Participates in the opening of bids and award of contracts for construction projects and the purchase of furniture, equipment and supplies.				6.613
7. Reviews and recommends approval of contract documents for construction.			6.320	
8. Makes a continuing assessment of the potential exposure of school district board members, administrative and other personnel to liability and litigation.				6.587
9. Performs liaison with other government agencies in relation to responsibilities for building codes, health and sanitation, utilities, streets and sidewalks and other such services.			5.840	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 18

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
<u>Staff Development</u>				
1. Determines the need for the continuing education of school business management personnel.			5.480	
2. Plans a continuing program of staff development in the responsibilities performed by school business personnel.			5.333	
3. Organizes the needed staff development program.			5.333	
4. Recruits, selects and assigns personnel to positions in the staff development program.			5.067	
5. Communicates and informs the staff and others about the activities, needs and accomplishments of the staff development program.			4.787	
6. Coordinates the work activities of the staff development program.			4.973	
7. Maintains a management control system that verifies that staff development activities are being conducted according to plan and provides for corrections when not conducted as planned.			4.840	
8. Continuously evaluates the staff development program.			5.267	
<u>Student Activity Funds</u>				
1. Prepares a district wide plan for the accounting and auditing of school activity or study body funds.			6.067	
2. Develops an organizational structure for the management, accounting and auditing of school activity funds.			5.920	
3. Recommends policies, rules and regulations regarding the management of school activity funds.			6.160	
4. Conducts internal audits of school activity funds.			6.067	
5. Establishes appropriate records and controls for the management of school activity funds.			6.160	

IMPORTANCE SCORES BASED ON RESPONDENTS RATINGS OF COMPETENCY STATEMENTS -- 19

Competency Statement	No Importance	Low Importance	Average Importance	High Importance
6. Prepares an accounting manual or handbook to guide the management of school activity funds.			5.200	
7. Communicates and informs the staff and others regarding legal and regulatory responsibilities relative to the management of school activity funds.			5.880	
8. Continuously evaluates the management of school activity funds.			6.120	
<u>Educational Resource Management</u>				
1. Utilizes the process of systematic planning in the school business operation.			6.133	
2. Prepares goals and measurable objectives in cooperation with the chief school officer and lower level management staff for the operation of the school business program.			6.413	
3. Utilizes the techniques of systems analysis in assessing the needs of the business program in the school district.			5.253	
4. Utilizes the program structure of the school district in the preparation of the educational budget document.			6.320	
5. Makes cost effectiveness studies of each program area of school district operations.			5.920	
6. Utilizes the program structure of the school district in the development of a chart of accounts for accounting purposes.			6.347	
7. Prepares a program budget for school district operation.			6.253	
8. Prepares a multi-year program budget as a basis for short term financial planning.			5.547	
9. Performs cost analysis studies of the school business operations of the school district.			6.240	
10. Evaluates, continuously, the effectiveness of resource allocation and resource utilization for all school district programs.			6.107	

APPENDIX III:
FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES
By COMPETENCY STATEMENTS

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
<u>General</u>								
1. Develops a comprehensive plan for the implementation and operation of the school business program.	0	-	16	21	1	1	58	77
2. Formulates an organizational structure for the management of the school business program.	1	1	22	29	1	1	51	68
3. Recruits, selects and assigns personnel to positions in the school business program.	0	-	2	43	10	13	33	44
4. Plans and implements a personnel management system for personnel assigned to the school business program.	3	4	35	47	8	11	29	39
5. Creates a working climate in which school business employees find personal satisfaction.	0	-	40	53	2	3	33	44
6. Communicates and informs the staff and others about what the school business program is accomplishing at various levels within the organization.	0	-	30	40	3	4	42	56
7. Provides communication opportunities for personnel at all levels of the organization to express themselves.	6	8	35	47	11	15	23	34
8. Coordinates the work activities of the business organization.	2	3	15	20	14	19	44	59
9. Operates a management control system which verifies that business work activities are conducted in accordance with performance objectives and which corrects activities when they do not meet expectations.	4	5	22	29	9	12	40	53
10. Provides a system of continuous and periodic appraisal of the school business operation.	1	1	26	35	6	8	42	56
11. Weighs alternatives and their consequences when making decisions about the school business program.	0	-	30	40	0	-	45	60
<u>Educational Facilities Planning</u>								
1. Determines school plant needs of the school district.	12	16	53	71	7	9	3	4
2. Prepares a comprehensive plan for the development and improvement of educational facilities.	15	20	47	63	9	12	4	5

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 2

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
3. Prepares educational specifications for proposed new and modernized school plants.	27	36	39	52	9	11	1	1
4. Organizes the facilities planning staff to perform its assigned roles and work activities.	27	36	33	44	7	9	8	11
5. Recruits, selects and assigns personnel to the facilities planning program.	34	45	30	40	4	5	7	9
6. Communicates and informs the staff and others about what the educational facilities planning program is accomplishing.	35	47	33	44	1	1	6	8
7. Coordinates the work activities of the educational facilities planning program.	35	47	27	36	8	11	5	7
8. Operates a management control system which verifies that facilities planning work activities are conducted in accordance with expectations and which corrects activities when they do not	28	37	33	43	10	13	5	7
9. Provides a system for the continuous appraisal of the educational facilities planning program including the evaluation of educational facilities operated by the school district.	27	36	38	51	6	8	4	5
10. Weighs alternatives and their consequences when making decisions about the facilities planning program.								
<u>Plant Maintenance</u>								
1. Determines the school plant maintenance needs of the school district.	21	28	44	59	3	4	7	9
2. Prepares a comprehensive plan for the management of the school plant maintenance program.	11	15	32	43	21	28	11	15
3. Recruits, selects and assigns personnel to the school plant maintenance program.	11	15	23	37	22	29	14	19
4. Organizes the school plant maintenance staff to perform the assigned roles and work activities of the maintenance program.	13	17	26	35	23	37	8	11
5. Communicates and informs the staff and others about what the school plant maintenance program is accomplishing at all levels within the organization.	13	17	22	29	34	45	6	8

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 3

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
6. Coordinates the work activities of the school plant maintenance program.	15	20	20	35	15	20	19	29
7. Operates a management control system which keeps the school plant maintenance program performing in accordance with expectations.	15	20	16	21	36	46	5	11
8. Provides a system of continuous and periodic appraisal of the school plant maintenance program.	13	17	22	29	28	37	12	16
9. Weighs alternatives and their consequences when making decisions about the school plant maintenance program.	10	13	30	40	21	28	14	19
<u>Plant Operations</u>								
1. Determines the plant operation needs of the school district.	10	13	38	51	11	15	16	21
2. Develops a comprehensive plan for the implementation and management of the plant operations program.	11	15	31	41	22	29	11	15
3. Formulates an organizational structure for the implementation of the plant operations program.	11	15	26	35	29	39	9	12
4. Recruits, selects and assigns personnel to the plant operations program.	11	15	30	40	15	20	19	25
5. Communicates and informs the staff and others about what the school plant operations program is accomplishing.	15	20	28	37	26	35	6	8
6. Coordinates the work activities of the plant operations program.	14	19	34	45	12	16	15	20
7. Operates a management control system which keeps the school plant operations program performing in accordance with expectations.	13	17	19	25	33	51	5	7
8. Provides a system of continuous and periodic appraisal of the plant operations program.	12	16	27	36	27	36	9	12
9. Considers alternatives and their consequences when making decisions about the school plant operations program.	8	11	33	44	23	31	11	15

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 4

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
<u>Construction Management</u>								
1. Develops a comprehensive plan for the construction and modernization of school plants in the school district.	9	12	39	52	9	12	18	24
2. Formulates an organizational structure for the management of the school construction program.	18	24	48	64	2	3	7	9
3. Recruits, selects and assigns personnel to positions and responsibilities in the school construction program.	20	27	42	56	3	4	10	13
4. Communicates and informs the staff and others about what the school construction program is accomplishing at various levels within the organization.	27	36	37	49	6	8	5	7
5. Coordinates the work activities of the school construction program.	23	31	42	56	2	3	8	11
6. Operates a management control system which keeps the school construction program performing in accordance with expectations.	24	32	31	41	9	12	11	15
7. Provides a system of continuous and periodic appraisal of the school construction program.	24	32	29	39	7	9	15	20
8. Weighs alternatives and their consequences when making decisions about the school plant maintenance program.	23	31	32	43	8	11	12	16
<u>Financial Planning and Budgeting</u>								
1. Provides a system for the continuous planning of the long term fiscal needs of the school district.	17	23	44	59	3	4	11	15
2. Organizes school district personnel for the preparation of the educational budget of the school district.	1	1	22	29	3	4	49	65
3. Coordinates the preparation of the educational budget.	3	4	30	40	3	4	39	52
4. Reconciles available resources and expected revenues with the fiscal needs of the school district.	0	-	23	31	6	8	46	61
5. Prepares the budget document.	1	1	18	24	7	9	49	65

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 5

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
6. Operates a fiscal control system which monitors school expenditures and verifies that expenditures are made in accordance with budgeted expenditures.	2	3	16	21	12	16	45	60
7. Provides a system for the continuous appraisal of the adequacy of the educational budget.	0	-	9	12	26	35	40	53
8. Continually communicates and informs the school board, the staff and others about the educational budget and its changing status.	1	1	28	37	9	12	37	49
<u>Purchasing</u>								
1. Develops a comprehensive plan for purchasing that fulfills the educational goals, instructional needs and service requirements of the school district.	0	-	18	24	2	3	65	73
2. Cooperates with and assists all levels of the school district organization in determining the supply and equipment needs of the school district.	1	1	17	23	16	21	41	55
3. Develops an efficient procurement system for requisitioning and purchasing supplies and equipment.	3	4	31	41	21	28	20	27
4. Coordinates the preparation of specifications for supplies and equipment with budget requirements and the needs of users.	1	1	12	16	24	32	38	51
5. Designs and utilizes appropriate forms, records and reports to fulfill the requirements of the purchasing function.	1	1	15	20	23	31	36	48
6. Prepares and utilizes bid documents and contract forms designed to meet desired standards of efficiency and legal requirements.	1	1	12	16	26	35	36	48
7. Organizes the purchasing staff to perform assigned roles and activities in the purchasing program.	2	3	12	16	23	31	33	51
8. Communicates and informs school district personnel about the purchasing program and its activities.	3	4	7	9	18	24	47	63
9. Authorizes the payment of supply and equipment invoices.	3	4	13	17	16	21	43	57
10. Coordinates and monitors the work activities of the purchasing program.	0	-	8	11	21	28	46	61

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 6

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
11. Coordinates the preparation of a purchasing calendar to assure the availability of supplies and equipment as needed.	1	1	8	11	22	29	44	59
12. Continuously appraises the purchasing program and implements changes as needed to improve the efficiency of the program.	1	1	15	20	24	32	35	47
<u>Warehousing and Supplies Management</u>								
1. Develops a comprehensive warehousing plan.	1	1	23	31	10	13	41	55
2. Organizes the warehousing program.	21	28	15	20	23	31	16	21
3. Recruits, selects and assigns personnel to the warehousing program.	22	29	12	16	31	41	10	13
4. Organizes the warehousing space and arranges the physical stock in accordance with school district supply and equipment needs.	27	36	16	21	20	27	12	16
5. Establishes a stock locator system.	27	36	7	9	41	55	0	-
6. Coordinates and monitors activities designed to provide good storage management.	27	36	8	11	37	49	3	4
7. Coordinates and monitors warehouse receiving functions.	22	29	15	20	35	47	3	4
8. Selects and organizes an appropriate warehouse inventory system.	23	31	10	13	40	53	3	4
9. Conducts a periodic audit of the warehouse stock.	23	31	9	12	37	49	6	8
10. Prepares a warehouse catalog.	26	35	8	11	35	47	6	8
11. Organizes and monitors the distribution and delivery of items requisitioned from the warehouse.	32	43	2	3	37	49	4	5
12. Coordinates the appraisal of the warehousing program.	23	31	8	11	42	56	2	3
<u>Food Service</u>								
1. Develops a comprehensive plan for the implementation and operation of the food service program.	25	33	18	24	17	23	15	20

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 7

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
2. Prepares an organizational plan for the management of the food service program including the physical arrangements for preparing and serving food.	14	19	18	24	22	29	21	28
3. Recruits, selects and assigns personnel to the food service program.	19	25	13	17	35	47	8	11
4. Coordinates the work activities of the food service program.	19	25	13	17	33	51	9	7
5. Prepares the budget for the food service program.	20	27	8	11	40	61	1	1
6. Conducts studies to determine the need for free and/or reduce price lunches.	15	20	22	29	28	29	10	11
7. Sets the standard and/or reduce prices to be paid for school lunches served by the schools.	14	19	13	17	37	49	11	15
8. Prepares and distributes the school lunch menu.	22	29	15	20	21	28	17	23
9. Prepares internal audits of school food service accounts.	26	35	4	5	44	59	1	1
10. Operates a management control system to verify that food service work activities fulfill requirements.	11	15	15	20	26	35	23	31
11. Communicates the needs and accomplishments of the food service program to the staff and the general public.	13	17	18	24	36	48	8	11
12. Coordinates the continuous appraisal of the food service program.	14	19	26	35	19	25	16	21
<u>Transportation Services</u>								
1. Provides a system for the continuous planning of the transportation program.	12	16	29	39	19	25	15	20
2. Organizes the transportation personnel to perform the work activities of the transportation program.	12	16	22	29	19	25	22	29
3. Recruits, selects and assigns personnel to positions in the transportation program.	20	27	12	16	32	43	11	15
4. Develops a comprehensive program of safety for the transportation program.	21	28	11	15	34	45	9	12

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES --8

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	NO	%	No	%	No	%
5. Provides repair facilities for the transportation program.	18	24	20	27	31	41	6	8
6. Develops and monitors a comprehensive routing and bus stop plan.	23	31	14	19	32	43	6	8
7. Prepares and monitors a bus driver training program.	22	29	8	11	36	48	9	12
8. Organizes and monitors the school bus maintenance program.	24	32	6	8	40	53	5	7
9. Communicates and informs school district personnel and the lay public about the transportation program and its activities.	24	32	8	11	40	53	3	4
10. Coordinates the purchase of transportation equipment, spare parts and supplies.	22	29	16	21	19	25	18	24
11. Maintains records and accounts for the transportation program.	22	29	13	17	34	45	6	8
12. Continuously evaluates the transportation program.	13	17	8	11	42	56	12	16
<u>Property Management</u>								
1. Develops a comprehensive plan for a property management program that fulfills the needs of the school district.	15	20	26	35	10	13	24	32
2. Organizes a property management program.	4	5	23	31	11	15	37	49
3. Maintains an up-to-date inventory record of school property owned and/or used by the school district.	4	5	22	29	18	24	31	41
4. Establishes a property accounting system.	4	5	13	17	40	53	13	24
5. Coordinates and monitors the property accounting system.	6	8	12	16	23	37	29	39
6. Provides the continuous evaluation of the adequacy of school property owned and/or used by the school district.	6	8	17	23	23	37	24	32
7. Coordinates and monitors the utilization of school property.	4	5	33	44	18	24	20	27
8. Makes periodic reports on the status of school properties owned and/or used by the school district.	5	7	33	51	16	21	16	21
9. Coordinates the continuous appraisal of the property management program.	3	4	23	37	13	24	26	35

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 9

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
<u>Fiscal Accounting and Financial Reporting</u>								
1. Develops a fiscal accounting system for the school district.	5	7	29	39	18	24	23	31
2. Prepares an organizational structure for the management of the fiscal accounting system.	4	5	11	15	11	15	49	64
3. Recruits, selects and assigns personnel to positions in the accounting program.	4	5	13	17	6	8	52	69
4. Establishes the procedures for classifying fund and receipt accounts.	4	5	18	24	12	16	41	55
5. Executes the functions and responsibilities as the custodian of school funds.	4	5	10	13	14	19	47	63
6. Prepares periodic financial reports for the board of education.	7	9	10	13	16	21	42	56
7. Makes financial reports to the state department of education.	4	5	9	12	22	29	40	53
8. Keeps the superintendent and board of education informed of the financial condition of the school district.	4	5	12	16	17	23	42	56
9. Establishes a system of internal accounts.	2	3	5	7	4	5	64	85
10. Coordinates and monitors the day-to-day operation of the fiscal accounting program.	3	4	11	15	19	25	42	56
11. Provides for the continuous appraisal of the accounting system.	3	4	9	12	28	37	35	47
<u>Classified Personnel Management</u>								
1. Develops a plan for the management of non-instructional personnel matters of the school district.	3	4	15	20	12	16	45	60
2. Prepares job specifications and job descriptions for non-instructional personnel employed in the school district.	13	17	36	48	7	9	19	25
3. Develops a program for the recruitment and appointment of non-instructional personnel employed by the school district.	12	16	35	47	12	16	16	21

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 10

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	NO	%	No	%	No	%
4. Appraises the work loads as well as the adequacy of number of personnel employed to perform non-professional services for the school district.	12	16	38	51	12	16	13	17
5. Maintains a personnel records system on non-instructional personnel.	9	12	41	55	14	19	11	15
6. Develops and implements a program for the orientation of new non-instructional personnel.	18	24	20	27	27	36	10	13
7. Formulates wage and salary programs for non-instructional personnel.	15	20	30	40	27	36	3	4
8. Develops and monitors the implementation of a program for the evaluation of the performance of non-instructional personnel.	7	9	47	63	4	5	17	23
9. Develops and implements a systematic program for producing agreement on working conditions, salaries, wages and benefits between the school district and non-instructional employees.	11	15	41	55	15	20	8	11
10. Continually monitors and evaluates the non-instructional personnel management program.	10	13	41	59	9	12	12	16
<u>Fiscal Audits and Reports</u>								
1. Develops a plan for determining the effectiveness of internal fiscal controls and the mathematical accuracy, legality, propriety, and completeness of all financial transactions.	3	11	41	55	12	16	14	19
2. Conducts preaudits to prevent unauthorized or illegal expenditures.	4	5	14	19	14	19	43	57
3. Provides for a continuous audit to examine fiscal records, transactions, entries and statements for regularity and accuracy.	7	9	13	17	21	28	34	45
4. Provides for the systematic investigation, verification and critical review of the financial operations of the school district by an independent auditor.	5	7	13	17	23	37	29	39
5. Reports a summary of the independent audit to the chief school officer and the board of education.	3	11	13	17	3	11	46	61
6. Evaluates the effectiveness of the overall auditing procedures utilized by the school district.	6	3	7	9	5	7	57	76

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 11

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
<u>Insurance and Risk Management</u>								
1. Determines the insurance needs of the school district.	4	5	20	27	7	9	44	59
2. Prepares a comprehensive plan for the management of the insurance program.	5	7	27	36	8	11	35	47
3. Assigns responsibilities for the insurance program to personnel on the school business staff.	4	5	23	31	8	11	40	53
4. Organizes the staff to perform the work activities of the insurance program.	6	8	10	13	11	15	45	64
5. Communicates and informs the staff and others about the work activities of the school insurance program.	4	5	18	24	15	20	38	51
6. Coordinates the work activities of the school insurance program.	5	7	21	28	13	17	36	48
7. Operates a management control system which keeps the school insurance program performing in accordance with expectations.	4	5	14	19	17	23	40	53
8. Provides for the continuous evaluation of the school insurance program.	4	5	21	28	9	12	41	55
<u>Plant Security and Property Protection</u>								
1. Prepares a comprehensive plan for the protection and security of school property.	2	3	21	28	5	7	47	63
2. Organizes a property protection program.	8	11	35	47	23	31	9	12
3. Recruits, selects and assigns personnel to positions in the property protection program.	11	15	29	39	26	35	9	12
4. Develops a comprehensive program of fire safety for the schools.	20	27	26	35	26	35	3	4
5. Provides a comprehensive plant security program.	13	24	26	35	25	33	6	8
6. Coordinates and monitors the fire safety program.	11	15	31	41	25	33	8	11
7. Coordinates and monitors the plant security program.	18	24	28	37	27	36	2	3

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 12

Competency Statement	NO		SHARES		DELEGATES		PERFORM'S	
	No	%	NO	%	No	%	No	%
8. Develops and monitors a reporting system for the property protection program.	10	13	30	40	31	41	4	5
9. Communicates the needs and accomplishments of the property protection program.	9	12	29	39	29	39	8	11
10. Operates a management control system which keeps the property protection program performing in accordance with expectations.	9	12	33	44	21	28	12	16
11. Coordinates the evaluation of the property protection program.	11	15	29	39	27	36	8	11
<u>Debt Service and Capital Fund Management</u>								
1. Determines the fiscal requirements for financing the capital improvement program of the school district.	10	13	29	39	21	28	15	20
2. Prepares a short and long range plan for the financing of capital improvements in the school district.	7	9	22	29	4	5	42	56
3. Determines the methods used to finance capital improvements.	6	8	29	39	2	3	38	51
4. Prepares the capital improvement budget.	8	11	37	49	2	3	28	37
5. Communicates and informs the staff and others about the fiscal requirements for needed capital improvements.	5	7	25	33	5	7	40	53
6. Determines methods and procedures for debt service payments.	9	12	29	39	2	3	35	47
7. Establishes procedures of accounting for school bond payments and for capital outlay and debt service revenues and expenditures.	10	13	25	33	4	5	36	48
8. Operates a fiscal control system which monitors capital expenditures and verifies that expenditures are made according to plans.	10	13	17	23	11	15	37	49
9. Provides a system for the continuous appraisal of the capital funding and debt service program.	7	9	10	13	17	23	41	55
<u>Cash Management</u>								
1. Develops a plan for the management of temporarily idle funds in school district accounts.	7	9	22	29	5	7	41	55

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 13

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
2. Prepares a cash investment program.	7	9	13	17	6	8	49	65
3. Establishes investment procedures.	8	11	11	15	13	17	43	57
4. Invests temporarily idle funds in behalf of the school district board of education.	8	11	13	17	11	15	43	57
5. Monitors the cash investment program.	8	11	9	12	19	25	39	52
6. Establishes procedures to safeguard the management of funds invested on behalf of the school district.	5	7	10	13	14	19	46	61
7. Communicates the on-going activities and results of the investment program to the chief school officer and the school district board of education.	7	9	12	16	7	9	49	65
8. Continually monitors and appraises the investment program.	7	9	11	15	5	7	52	69
<u>Data Processing</u>								
1. Determines the data processing needs of the school business operation.	6	8	14	19	6	8	49	65
2. Develops a plan for the use of data processing in the storage and retrieval of data for use in the business operations of the school district.	9	12	30	40	7	9	29	39
3. Recruits, selects and assigns personnel to positions in the data processing program.	12	16	26	35	14	19	23	31
4. Organizes the data processing staff to perform assigned roles and work activities.	26	35	23	31	13	17	13	17
5. Communicates and informs the staff and others about the data processing program, its services, needs and accomplishments.	28	37	14	19	16	21	17	23
6. Coordinates and monitors the work of the data processing program.	15	20	24	32	14	19	22	29
7. Operates a management control system which keeps the data processing program performing in accordance with expectations.	22	29	15	20	22	29	16	21
8. Develops and implements a continuing evaluation of the data processing program.	20	27	18	24	18	24	17	25

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES --14

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
<u>Office Management</u>								
1. Determines the needs of the central school business office.	17	23	24	32	12	16	22	29
2. Develops plans for the operation of the school business office.	4	5	24	32	10	13	37	49
3. Prepares an organizational structure for the management of the school business office.	4	5	20	27	9	12	42	56
4. Recruits, selects and assigns personnel to positions in the school business office.	4	5	22	29	4	5	45	60
5. Prepares standards and procedures for the operation of the school business office.	4	5	25	33	11	15	35	47
6. Operates the school business office.	3	4	21	28	10	13	41	55
7. Designs and controls the design and use of office forms.	4	5	9	12	18	24	44	59
8. Selects office furniture and equipment for use in the school business operation.	2	3	29	39	19	25	25	33
9. Monitors and controls the work activities of the school business office.	4	5	32	43	15	20	24	32
10. Continually evaluates the effectiveness of office management practices.	3	4	22	29	14	19	36	48
<u>Community Relations</u>								
1. Participates in determining the need for a community relations program involving school business matters.	2	3	20	27	5	7	48	64
2. Plans a community relations program involving matters pertaining to school business operations.	10	13	57	76	2	3	6	8
3. Implements a program of public relations.	15	20	51	68	3	4	6	8
4. Provides the chief school officer, the members of the board of education and staff members with data and information on the business operation of the school district for use in the community								

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES --15

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
relations program.	25	33	42	56	4	5	4	5
5. Communicates the accomplishments, needs and services of the school business operation to the community.	14	19	15	20	3	4	43	57
6. Works with local civic, business, parent and other organizations in the interpretation of the total educational program.	14	19	42	56	2	3	17	23
7. Utilizes the various media in efforts to increase public understanding of the educational and business operations of the school district.	15	20	49	64	1	1	10	13
<u>Grantsmanship</u>								
1. Participates in determining the need and potential for obtaining grants to improve education in the school district.	14	19	45	60	4	5	12	16
2. Maintains a current catalog of agencies which participate in the funding of educational activities.	39	52	33	44	2	3	1	1
3. Makes contacts with key individuals in public agencies and private foundations who may serve as resource people in the process of securing grants.	51	68	18	24	4	5	2	3
4. Prepares an annual plan for seeking and obtaining grant funds.	50	67	19	25	3	4	3	4
5. Encourages school district personnel and others in the community to seek educational grants.	57	76	16	21	2	3	0	-
6. Prepares and assists with the preparation of grant applications.	51	68	21	28	2	3	1	1
7. Participates in conferences with proposal team and potential funding agency regarding grant awards.	29	39	33	51	7	9	1	1
8. Supplies fiscal data needed to complete grant applications and proposals.	34	45	35	47	1	1	5	7
9. Performs accounting functions relative to grant funds.	13	17	22	29	20	27	20	27
10. Prepares final reports for submission to funding agency or foundation.	14	19	14	19	31	41	16	21

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES--16

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
11. Continuously evaluates the effectiveness and fiscal value of the grants program to the school district.	20	27	18	24	24	32	13	17
<u>Payroll Management</u>								
1. Determines the needs for the establishment of payroll services in the school district.	31	41	35	47	2	3	7	9
2. Develops the schedule of salary payments.	2	3	17	23	12	16	44	59
3. Determines whether personal services have been performed.	3	4	27	36	23	31	22	29
4. Prepares checks or warrants used in salary payments.	2	3	32	43	25	33	16	21
5. Authorizes the release of salary payments.	8	11	2	3	57	76	8	11
6. Develops the system for delivering salary payments.	1	1	10	13	25	33	39	52
7. Supplies accounting office with salary payments data.	2	3	13	17	33	44	27	36
8. Prepares special reports required for income tax, social security, retirement and so on.	4	5	20	27	38	51	13	17
9. Continually evaluates the payroll management program and modifies its services as required.	3	4	6	8	55	73	11	15
<u>Professional Negotiations</u>								
1. Prepares plans for collective negotiations pertaining to non-professional employees.	2	3	18	24	15	20	40	53
2. Develops negotiations strategies.	22	29	40	53	0	-	13	17
3. Analyzes and evaluates employee proposals.	21	28	44	59	2	3	3	11
4. Obtains negotiations recommendations from management personnel.	16	21	46	61	1	1	12	16
5. Serves as chief negotiator for the management team.	24	32	42	56	1	1	8	11
6. Directs activities of management's negotiation team.	51	68	12	16	1	1	11	15

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 17

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
7. Communicates the activities of the negotiation process to the chief school officer, the board of education and other management personnel.	39	52	26	35	0	-	10	13
8. Interprets the meaning of negotiated contracts to management personnel.	34	45	31	41	1	1	9	12
9. Continually evaluates the policies, practices and procedures utilized by the management team in the collective negotiations process.	26	35	36	48	2	3	11	15
<u>Legal Control</u>								
1. Participates in the preparation of employment contracts for non-instructional personnel.	23	31	42	56	3	4	7	9
2. Participates in the selection of the school district attorney.	16	21	38	51	7	9	14	19
3. Makes recommendations regarding policy matters pertaining to school business affairs.	33	44	38	51	0	-	4	5
4. Prepares rules, procedures and regulations to implement school board policies and state laws pertaining to business affairs of the school district.	1	1	26	35	0	-	48	64
5. Participates in resolving legal problems pertaining to the acquisition and sale of school properties.	2	3	34	45	2	3	37	49
6. Participates in the opening of bids and award of contracts for construction projects and the purchase of furniture, equipment and supplies.	14	19	44	59	0	-	17	23
7. Reviews and recommends approval of contract documents for construction.	3	4	27	36	11	15	34	45
8. Makes a continuing assessment of the potential exposure of school district board members, administrative and other personnel to liability and litigation.	10	13	41	55	3	4	21	28
9. Performs liaison with other government agencies in relation to responsibilities for building codes, health and sanitation, utilities, streets and sidewalks and other such services.	8	11	46	61	4	5	17	23

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES --18

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
<u>Staff Development</u>								
1. Determines the need for the continuing education of school business management personnel.	12	16	39	52	8	11	16	21
2. Plans a continuing program of staff development in the responsibilities performed by school business personnel.	11	15	32	43	3	4	29	39
3. Organizes the needed staff development program.	10	13	35	47	7	9	23	31
4. Recruits, selects and assigns personnel to positions in the staff development program.	11	15	35	47	8	11	21	28
5. Communicates and informs the staff and others about the activities, needs and accomplishments of the staff development program.	17	23	34	45	6	8	18	24
6. Coordinates the work activities of the staff development program.	17	23	33	44	4	5	21	28
7. Maintains a management control system that verifies that staff development activities are being conducted according to plan and provides for corrections when not conducted as planned.	19	25	28	37	11	15	17	23
8. Continuously evaluates the staff development program.	21	28	29	39	6	8	19	25
<u>Student Activity Funds</u>								
1. Prepares a district wide plan for the accounting and auditing of school activity or study body funds.	16	21	34	45	2	3	23	31
2. Develops an organizational structure for the management, accounting and auditing of school activity funds.	12	16	15	20	10	13	38	51
3. Recommends policies, rules and regulations regarding the management of school activity funds.	12	16	21	28	12	16	30	40
4. Conducts internal audits of school activity funds.	9	12	22	29	7	9	37	49
5. Establishes appropriate records and controls for the management of school activity funds.	13	17	13	17	31	41	18	24

FREQUENCY AND PERCENT OF RESPONSIBILITY RESPONSES BY COMPETENCIES -- 19

Competency Statement	NO		SHARES		DELEGATES		PERFORMS	
	No	%	No	%	No	%	No	%
6. Prepares an accounting manual or handbook to guide the management of school activity funds.	11	15	13	17	24	32	27	36
7. Communicates and informs the staff and others regarding legal and regulatory responsibilities relative to the management of school activity funds.	19	25	20	27	17	23	19	25
8. Continuously evaluates the management of school activity funds.	10	13	22	29	9	12	34	45
<u>Educational Resource Management</u>								
1. Utilizes the process of systematic planning in the school business operation.	9	12	20	27	14	19	32	43
2. Prepares goals and measurable objectives in cooperation with the chief school officer and lower level management staff for the operation of the school business program.	6	8	26	35	2	3	41	55
3. Utilizes the techniques of systems analysis in assessing the needs of the business program in the school district.	3	4	38	51	2	3	32	43
4. Utilizes the program structure of the school district in the preparation of the educational budget document.	16	21	25	33	5	7	29	39
5. Makes cost effectiveness studies of each program area of school district operations.	5	7	28	37	5	7	37	49
6. Utilizes the program structure of the school district in the development of a chart of accounts for accounting purposes.	8	11	31	41	11	15	25	33
7. Prepares a program budget for school district operation.	7	9	16	21	14	19	38	51
8. Prepares a multi-year program budget as a basis for short term financial planning.	11	15	20	27	10	13	34	45
9. Performs cost analysis studies of the school business operations of the school district.	19	25	20	27	7	9	29	39
10. Evaluates, continuously, the effectiveness of resource allocation and resource utilization for all school district programs.	6	8	17	23	11	15	41	55

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